

Course Manual: OUTLOOK



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OUTLOOK

The Outlook environment

Outlook organizes your **emails, calendars, contacts, tasks**, and to-do lists; all from a single location. This organization starts with your email account. From there, you can start using emails, convert them into tasks or appointments, and save information about the people you communicate with regularly, so you never have to remember an email address or phone number.

This software alone allows a real unified management in real time, of all your activities.

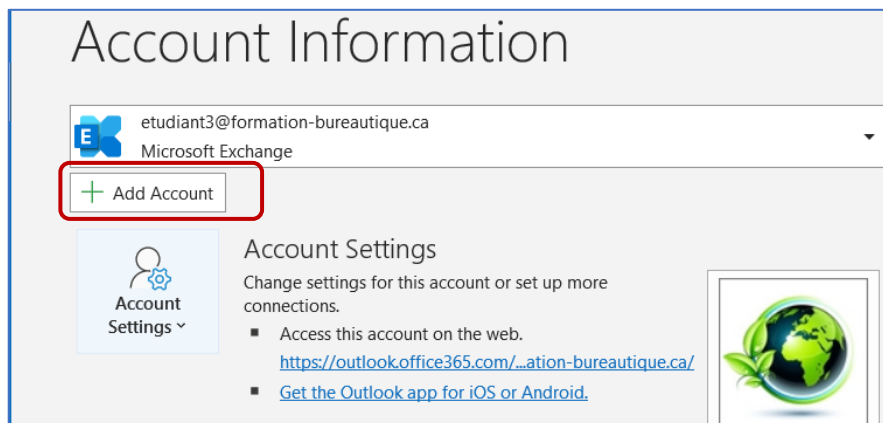
Microsoft Outlook allows you to work efficiently and quickly. In addition, Outlook Web App, and synchronization with smartphones (iPhone, BlackBerry) allows for more active tracking and invaluable time savings anytime, anywhere.

Set up your account

Your first action is to set up your Outlook account. After that, you will be able to start to receive and send emails, use the calendar, create contacts, and use Outlook tasks.

The configuration is automatic if you are using an earlier version of Outlook on the same computer. If not, automatic account configuration runs the first time Outlook starts and guides you through the process.

You are asked to provide your name, email address and a password. This is usually enough, but if automatic configuration fails, Outlook asks for some additional information, such as the name of your email server. If you do not have this information, your email provider can provide it to you.



If you want to add another email account later, when you're ready, select **File, Add Account** to start automatic account setup.

Navigation pane

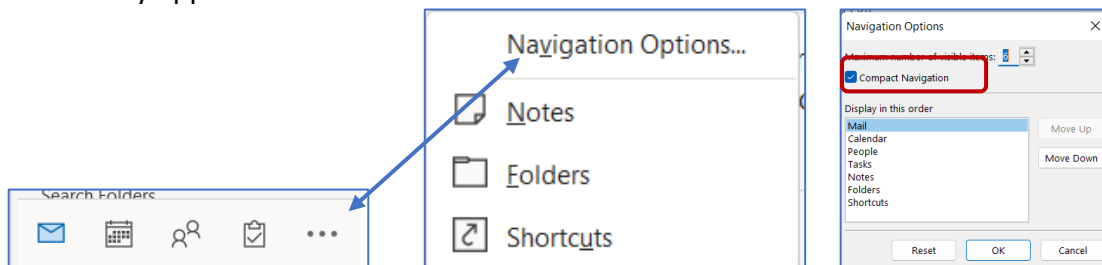
WHAT IS THE NAVIGATION PANE?

The **Navigation Pane** appears on the left side of the Outlook window and allows you to switch between different areas of Outlook, such as **Mail**, **Calendar**, **Contacts**, **Tasks**, and **Notes**. Additionally, when you work in a view, the Navigation Pane displays the folders in that view.

When you click a folder in the Navigation Pane, that folder becomes the current folder, and you can work with the items in it. For example, in **Mail**, click the Inbox folder to view new email messages. This becomes the **folder pane**.

CHANGE THE DISPLAY OF THE NAVIGATION PANE

You can control which buttons (or icons) appear in the Quick Access Bar and the order in which they appear.



- Click on the 3 small dots, then choose "Navigation options".
- If necessary, **disable** "Compact Navigation" to get this display



In the **Navigation Options** dialog box, do the following:

- To change the number of buttons or icons that appear on the bar, increase, or decrease the default setting (4) for the maximum number of visible items.
- To display icons instead of names, select the Compact navigation check box.
- To rearrange how buttons or icons appear, select an item in the Display in this order box, and then select Move Up or Move Down. Click OK.



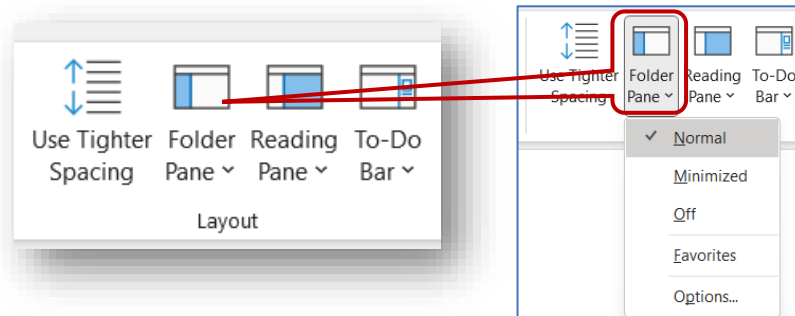
A little advice

*If you don't like the changes, you made or want to start over from the beginning, select **Reset**.*

Views - Organize the preview of your Outlook

FOLDER PANE

To change the views as needed, click on the **View** tab, **Layout** group.



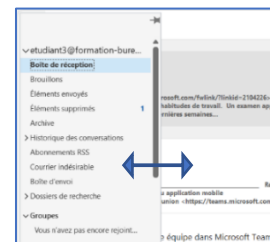
The folder pane is your browser through emails, sent items, drafts, deleted, and your folders

It should always be in "**Normal**", if you collapse it, click on "**Pin the folder pane**", or go back to "**Folder pane**" to return to "**Normal**"

- Check the option that best suits your needs. This one is on the left of your screen

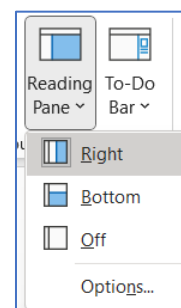
RESIZE THE FOLDER PANE

- Point to the right border of the navigation pane. When the pointer changes to an arrow, drag the border to the right or left.



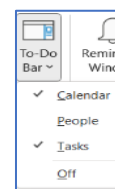
READING PANE

- You have the choice to display emails: either **right** or **bottom** or **off**



TO-DO BAR

- This display is on the right side of your screen



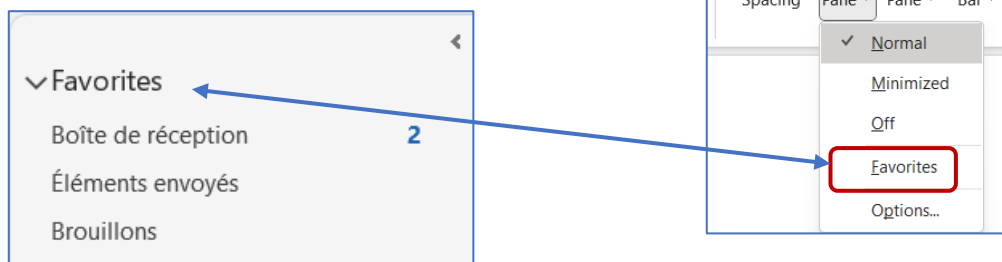
Favorites pane

TURN FAVORITES ON OR OFF

The **Favorites** feature can be turned off if you are not using it and want more space in the Folder pane. **Favorites**, located at the top of the Folder pane, contains shortcuts to folders that you use frequently.

You can't add or removed a folder in "**Favorites**". There is also no effect on the folders in the master folder list.

- In Mail, click View, Folder Pane, Favorites.
- If you turn Favorites off and turn them back on, the same folders are displayed.



Mail

New features and improvements allow you to be more efficient if you know where to find them. Fortunately, thanks to Outlook's advanced **Ribbon**, discovering additional commands is extremely easy. You no longer waste time looking for them.

Want to make your life easier when you set up new or existing contacts, print messages, or clean up your mailbox? The new **Office** is here to help. You can now manage your account, customize your Outlook interface, and run printouts much more easily, all from one place.

SAVE TIME VIEWING, CREATING, AND MANAGING YOUR EMAIL MESSAGES.

Think about how many messages you receive each week compared to five years ago. We've redesigned Outlook to reflect this evolution so you can control the large volumes of information that come to you every day.

- Easily manage large volumes of email. All it takes is a few clicks to group or classify emails. With the new management and **display** tools, you can summarize dozens of messages to a few relevant items and focus on other tasks, without getting cluttered.
- Send the right information to the right people and be reactive in your responses. **MailTips**¹ alerts you immediately to potential distribution issues

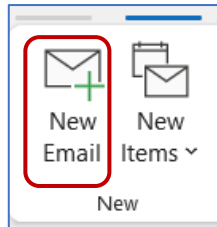
¹ MailTips requires Microsoft Exchange Server 2016 to be installed and must be enabled by an Exchange administrator.

and **Quick Actions** reduces repetitive tasks, which usually require multiple commands, to a single click.

The Email section allows you to communicate with people inside and outside your organization. You can add an email signature and attachments to your emails.

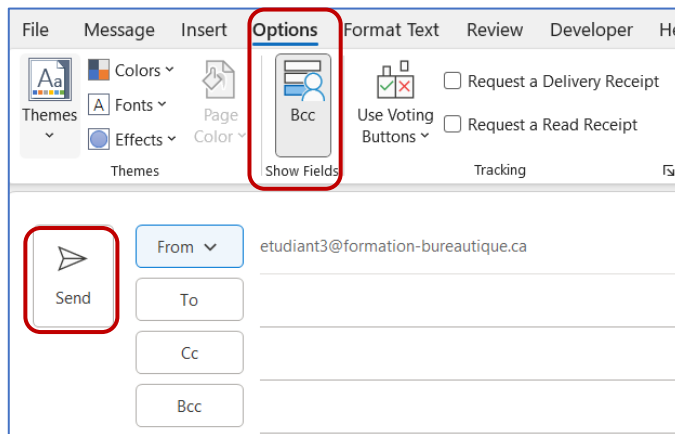
Create an email message

- From any email folder (for example, your inbox), select **New Email**.



- Keyboard shortcut: Press **Ctrl + Shift + M**.
- When you're done writing your message, select **Send**.

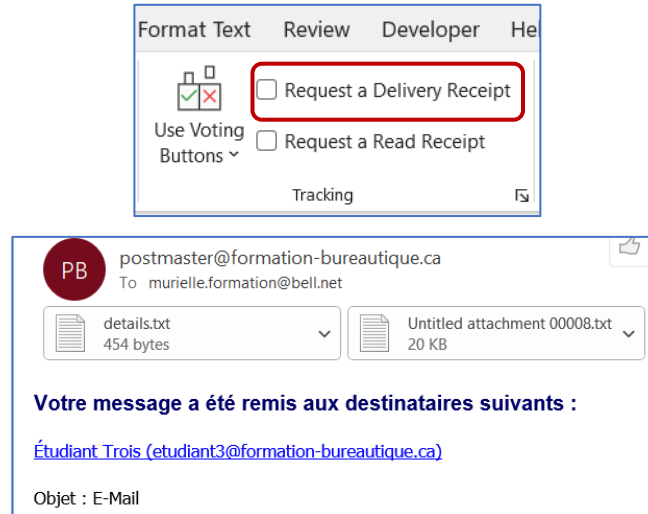
SEND AN EMAIL



- **"To"** field represents the recipient of the email
- Field **"Cc"** Means **"Carbon copy"**, an email is sent to two recipients. An email addressed to a person, but a copy sent as proof to a linked person.
- The field **"Bcc"** means **"Blind Carbon Copy"**. This is the correct field to use when you want to send a **"hidden copy"**. The addresses of the recipients registered in **"Bcc"** do not appear in the email received by the other recipients.

AN ACKNOWLEDGMENT OF RECEIPT

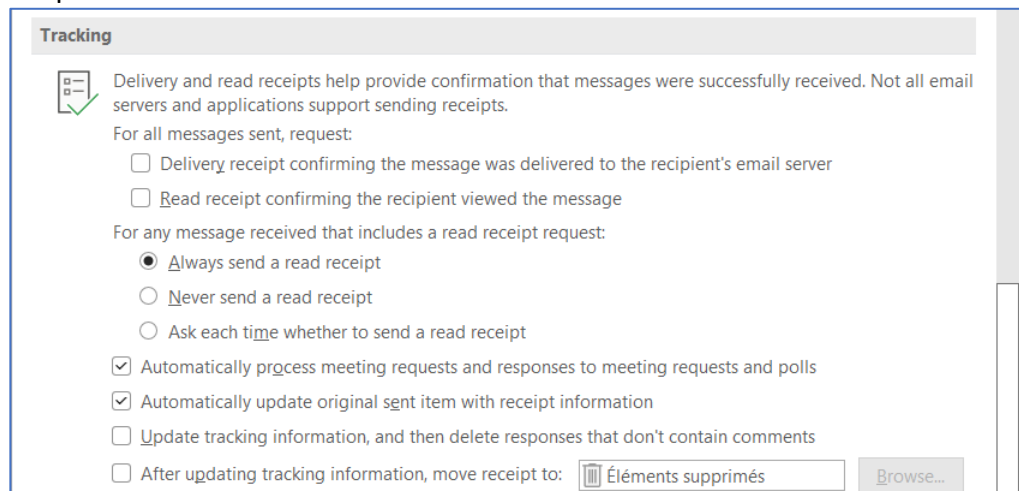
This confirms that your email has been delivered to the recipient's inbox, but not that the recipient has seen or read it.



READ RECEIPTS

However, the recipient of the message may refuse to send read receipts. In other cases, read receipts will not be sent, especially if the recipient's mail program does not support them. There is no way to force a recipient to send a read receipt.

- From the **File** menu, select **Options, Mail**.
- Under Tracking, select the check box Delivery receipt confirming the message was delivered to the recipient's email server or Read receipt confirming the recipient viewed the mail.





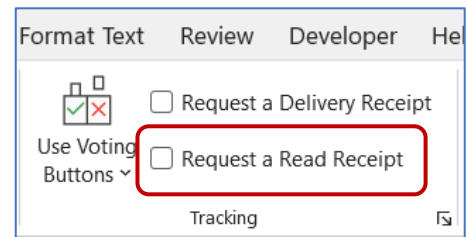
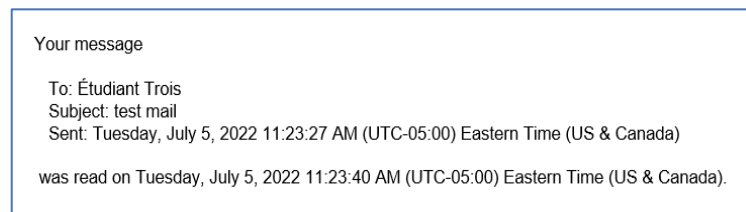
We recommend tracking only important messages, not all messages.

In a new email message, on the Options tab, "**Tracking group**", select the check box **Request a Delivery Receipt** or **Request a Read receipt**. Or enable both options.

FOLLOW THE DELIVERY RECEIPTS

If your messages are important and you want to keep them. Create a folder in your inbox that you can call: "**Important**" or "**Proof of receipt**" and move your message (Delivery Receipts) to the folder

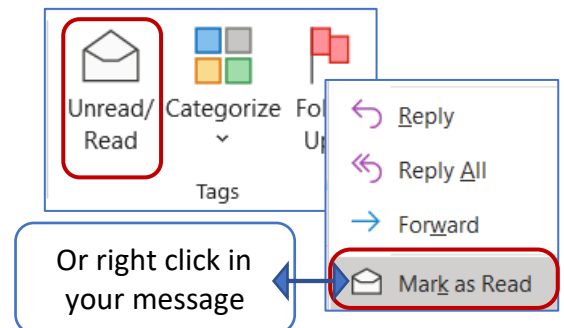
(See example of a delivery receipt below)



MARK MESSAGES AS READ OR UNREAD

Even if a message has been opened, you may want to mark it as unread to get your attention. You could also use the option of a flag to better manage your emails. (See **Follow up**)

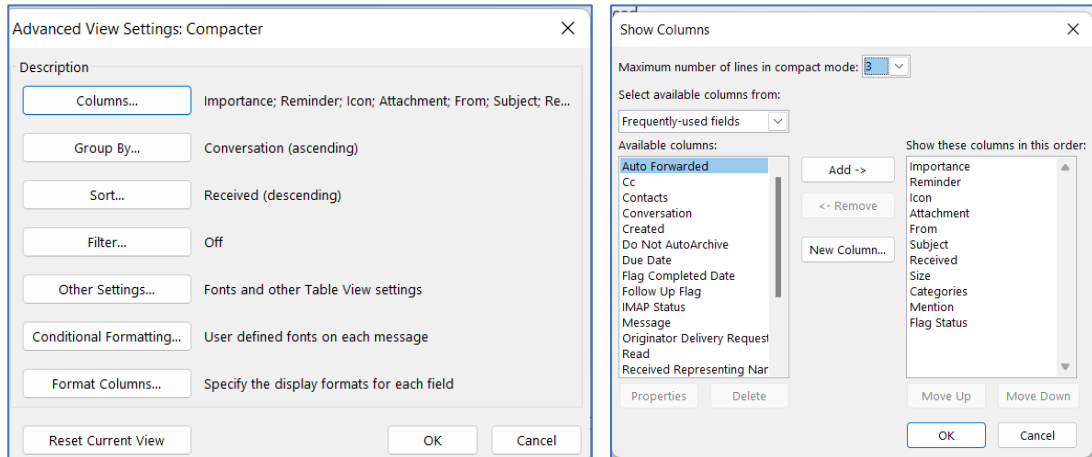
- Click in **Home, Tags** group, check Unread.
- OR
- Click the **File** tab
- Click **Options**
- Click Advanced
- Under Outlook Panes, click Reading Pane
- To enable this feature, select the box Mark items as read when viewed in the Reading Pane, and then enter a number in the box Wait X seconds before marking item as read.



ADD, REMOVE, OR MOVE A COLUMN

The method will be the same to add or remove or move

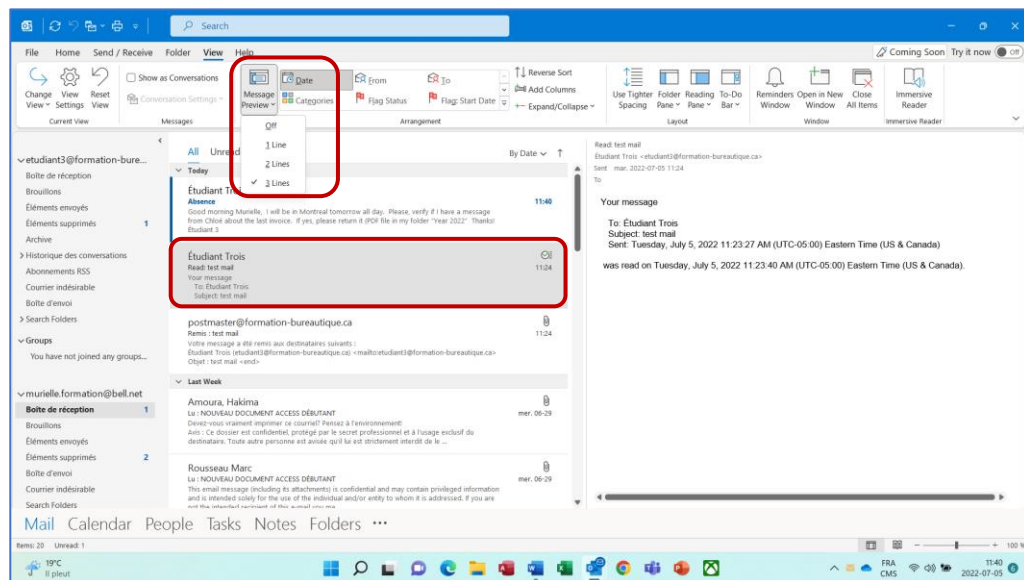
- On the View tab, Current View group, click View Settings.
- Click Columns
- In the list of columns, add as needed or delete or move in the order you want. (See window below)



NUMBER OF ROWS TO VIEW IN A MESSAGE

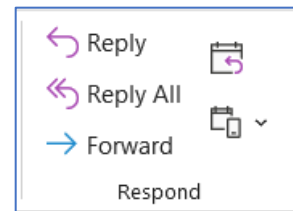
In general, in the preview of a message we only see the first line of the email, so here's what to do to get a little more.

- Click on the **View** tab, **Arrangement** group, Message Preview
- Check the number of rows you want.



REPLY TO OR FORWARD A MESSAGE

1. On the ribbon or in the reading pane, select **Reply**, **Reply All**, or **Forward**.



2. In the **To**, **Cc**, or **Bcc** box, do one of the following:
 - To add a recipient, click in the appropriate box, insert ";" and enter the recipient's name.
 - To delete a recipient, click in the appropriate box, select the recipient's name, and then tap Delete.
 - You can delete part of the original message to keep some privacy especially when you are forwarding a message.
 - **Reply:** To reply only to the sender
 - **Reply All:** for all recipients.
 - **Forward:** All attachments are automatically included when you forward the message

SUGGESTED REPLIES

Something new with Outlook: when you receive an email message that you want to answer with a short reply. Outlook suggests three responses that you can use to easily reply. Suggested replies are computer-generated and use natural language to provide response options.



Exemple

Start your reply all with:

Confirmed!

Confirmed, thank you.

Confirmed, thanks!

Insert attachment(s)

ATTACH FILES WITHOUT SEARCHING FOR THEM

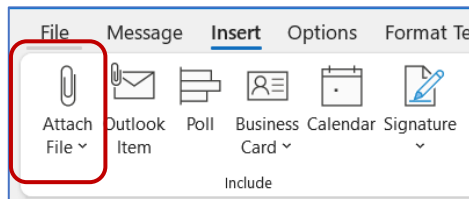
Need to attach an image or document? Outlook saves you time by keeping a list of your recently used files. Click the **Attach File** button when you create a message or meeting invitation and select the file you want to attach.

To participate in an existing group, start by searching for its name. On the **Home** tab of the Outlook application window, enter a keyword or phrase in the **Search for people** box, and then click to select the group you want to participate in.

ADD AN ATTACHMENT TO AN EMAIL MESSAGE

To share a file, you can attach it to your message. You can also attach other Outlook items, such as messages, contacts, or tasks.

- Create a new message or select an existing message, and then select **Reply**, **Reply All**, or **Forward**.
- In the message window, select **Message, Attach File**.



- Files used and / or saved recently will be in the list, this new option in Outlook will allow us to insert a file faster instead of using: Browse and search for the file to insert.

OPEN OR SAVE AN EMAIL ATTACHMENT

You can open an attachment from the reading pane or from an open message. After opening and viewing an attachment, you can save it. If a message contains multiple attachments, you can save them as a group or individually.

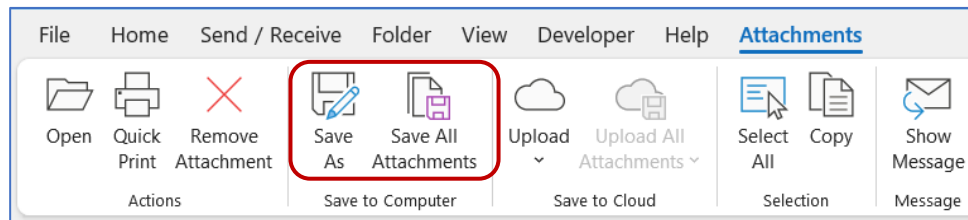
OPEN AN ATTACHMENT

Depending on the version of Outlook you are using, there may be several options available to open an attachment.

- Double-click the attachment.

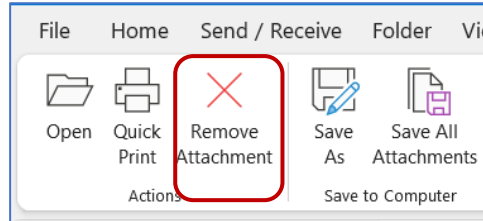
SAVE AN ATTACHMENT

- Select the attachment in the reading pane or the open message.
- On the **Attachments** tab, in the **Actions** group, select **Save As**. You can also right-click the attachment, and then select **Save As**.
- If you have multiple attachments, click **Save All Attachments**.



DELETE AN ATTACHMENT

- To keep a message but you want to delete the attachment because it is too large a file (Example: "PDF"), tap **Remove attachment**.
- You keep the message, but the attachment is no longer in the message.



Message Management

It is important to organize all our messages. Sometimes, to facilitate the work, it is necessary to modify the display to identify certain messages.

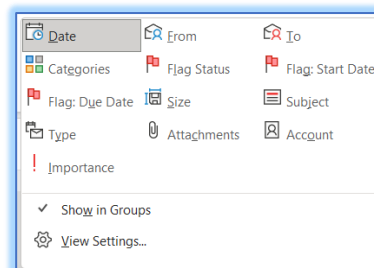
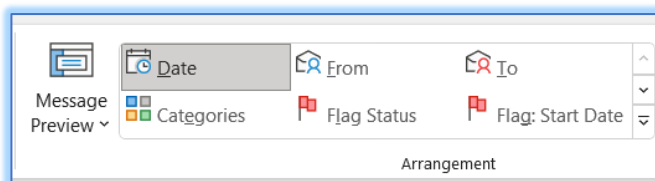
That's why the **Organize** option will come in handy.

ORGANIZE AND SORT YOUR MESSAGES

Organizing means that we want to put in ascending or descending order our messages, we want to classify our messages, either by **Date**, **From**, **To**, **Attachments**, etc.

The **Show in Groups** option is also a way to better view your messages.

You will find **Organize** from the **View** tab, **Arrangement** group.

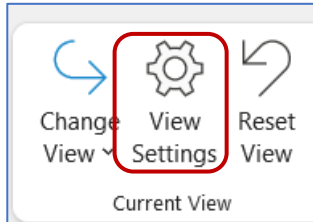


Note

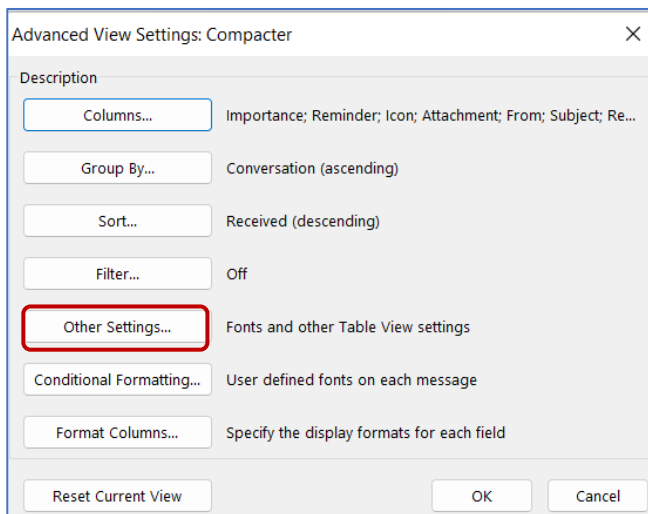
CHANGE THE FONT SIZE OF MESSAGES

You can change the font size in your **Inbox**

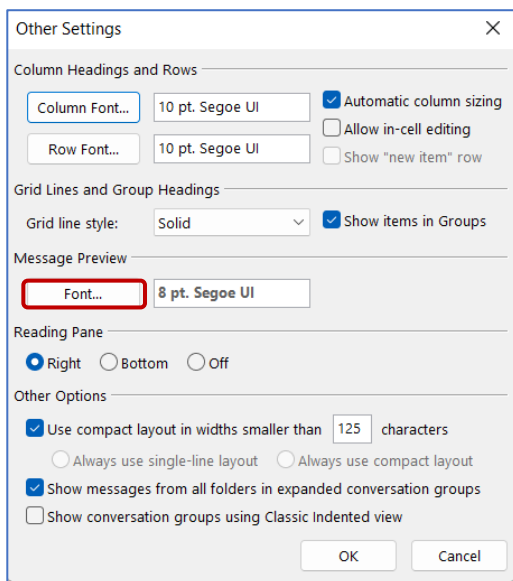
- Click in View Settings ► Group ► "Current View"



- Click Other Settings



- Click Font to change the size and the color as needed

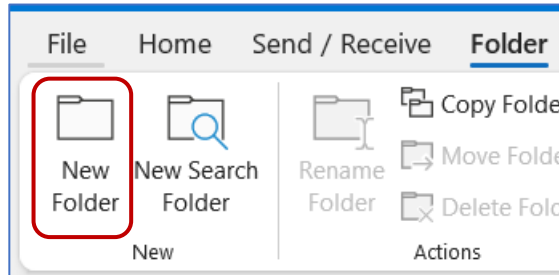


Folders Management

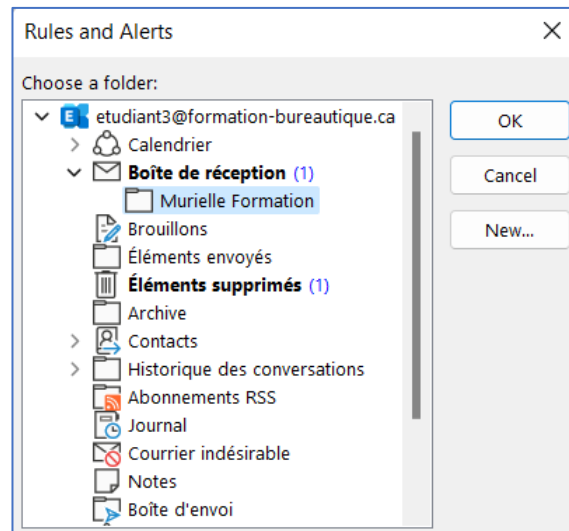
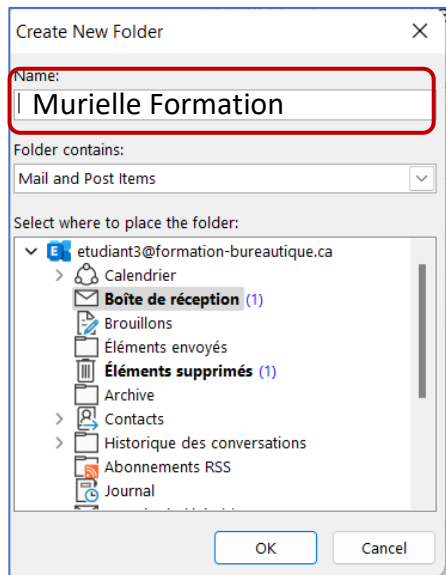
You can create folders in Outlook to organize your messages in your own way. For all messages from a particular contact, make sure that their messages automatically enter that folder.

CREATE A FOLDER

1. Click in the **Inbox**



2. Click Folder from the **Folder tab**, Group ► **"New"**
3. Give your folder a name. example: Name of the folder **"Important"** to drop your important messages that you don't want to delete and keep, but not in your inbox

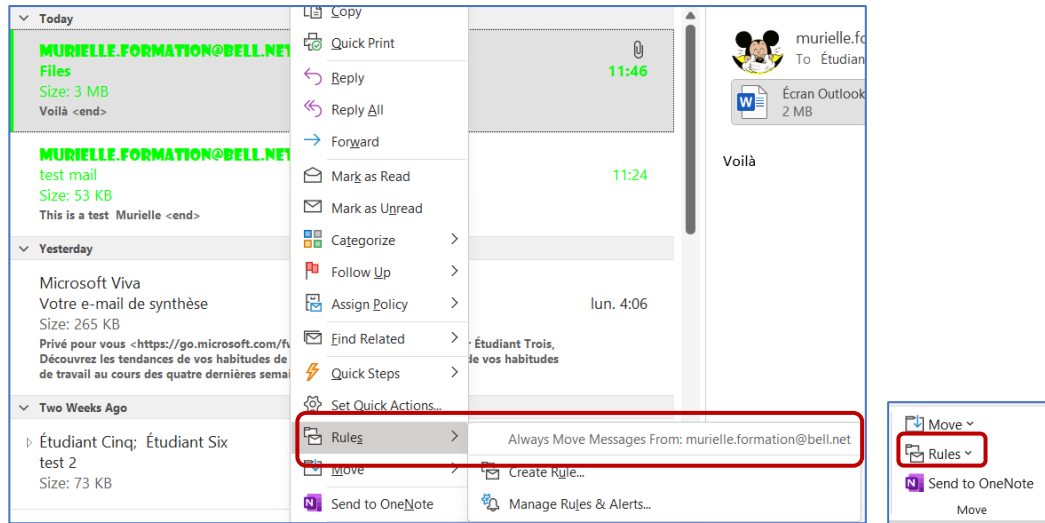


4. Drag your messages to this folder

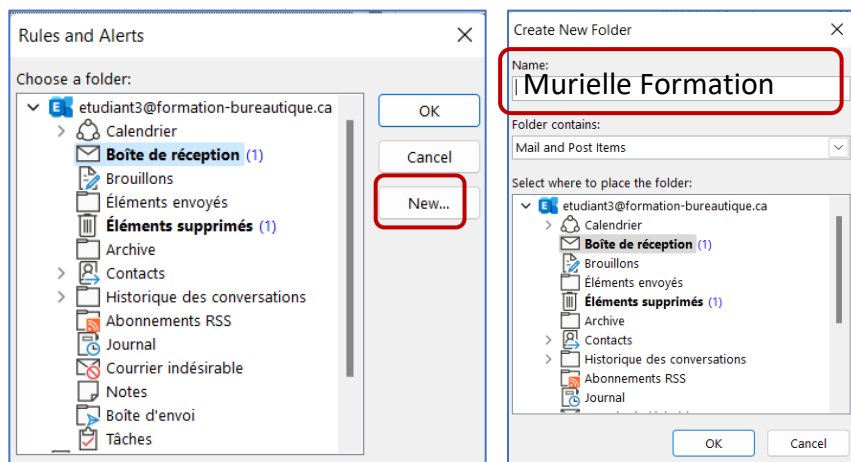
CREATE A RULE FOR A FOLDER

You can move all messages from a specific person to a folder

1. The first method would be to create the folder in advance as we just did in the previous step, we will see the second method in the next step.
2. Click in one of the messages where you want to deposit all your emails from the same contact.



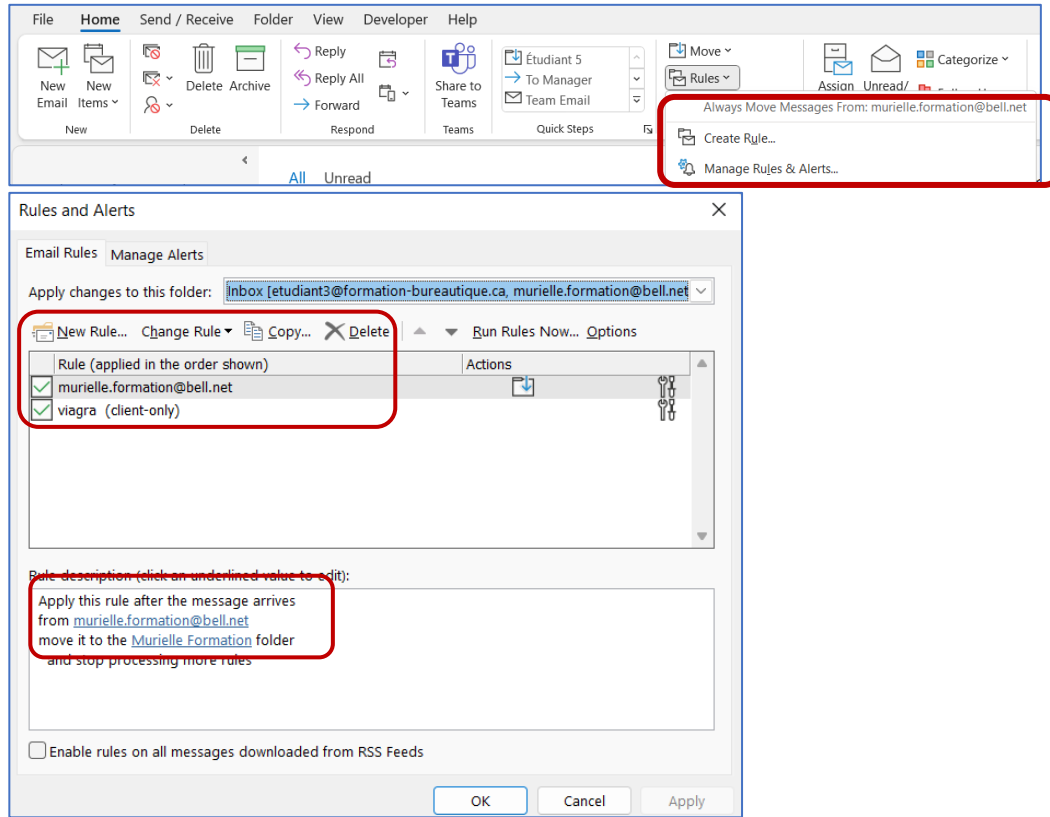
3. Either right click, or **Home** tab, Group ► **"Move"**, click in **Rules**
4. Click **Always move messages from...** (Email address)
5. Make sure you're in the inbox
6. It's still time to create the new folder
Click **"New"**



7. Click **OK**

FIX OR DELETE A RULE ABOUT A FOLDER

1. Click in Manage rules and alerts
2. Click in the rule you want to **edit**

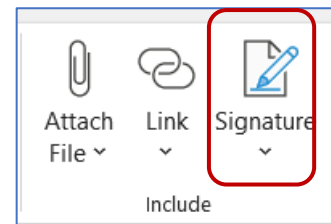


3. Or click **Delete**

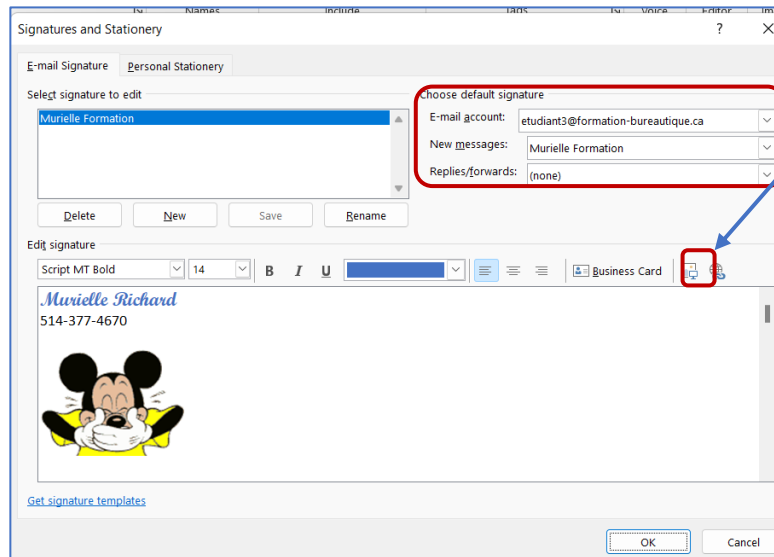
Create a signature

Create custom signatures at the bottom of your messages. Signatures can include text, images, your electronic business card, a logo, or even an image of your handwritten signature.

1. In a new message, select **Signature**, "Signatures" from the **Include** group
2. On the **Email Signature** tab, select **New**.
3. Type a name, and then select OK.
4. Under **Choose default signature**, do the following:
 - In the **Email account** list, select the email account to which you want to associate the signature.



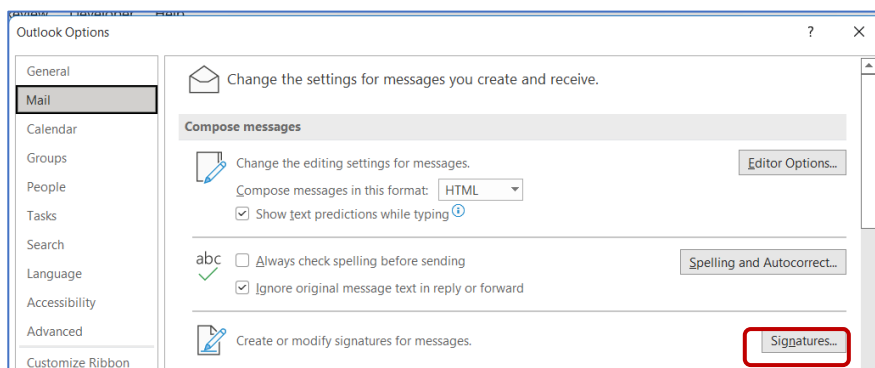
- In the **New messages** list, select the signature that you want to automatically add to all new email messages. If you ignore this option, the default value is (**none**).
- In the **Replies/Forwards** list, select the signature to add automatically (auto-signature) when you reply to or forward messages. Otherwise, accept the default option, (**none**).
- Under **Edit signature**, type signature
- Choose your Font, text size and logo image as needed.
- Then select **OK**



You can have multiple signatures.

ADD A SIGNATURE "

You can create a signature from **File, Options, Mail**, and then **Signatures**

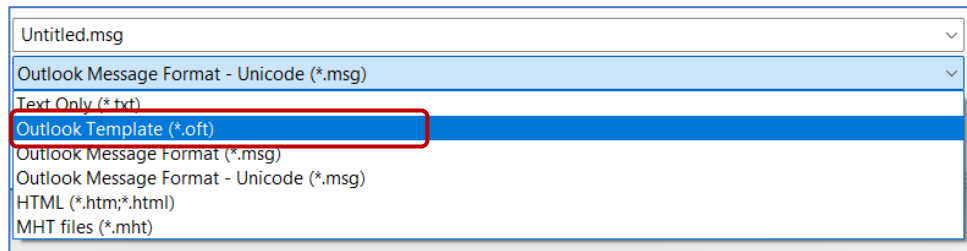


- In a new message, click **Signature**, and then select the signature you want

Create a message template

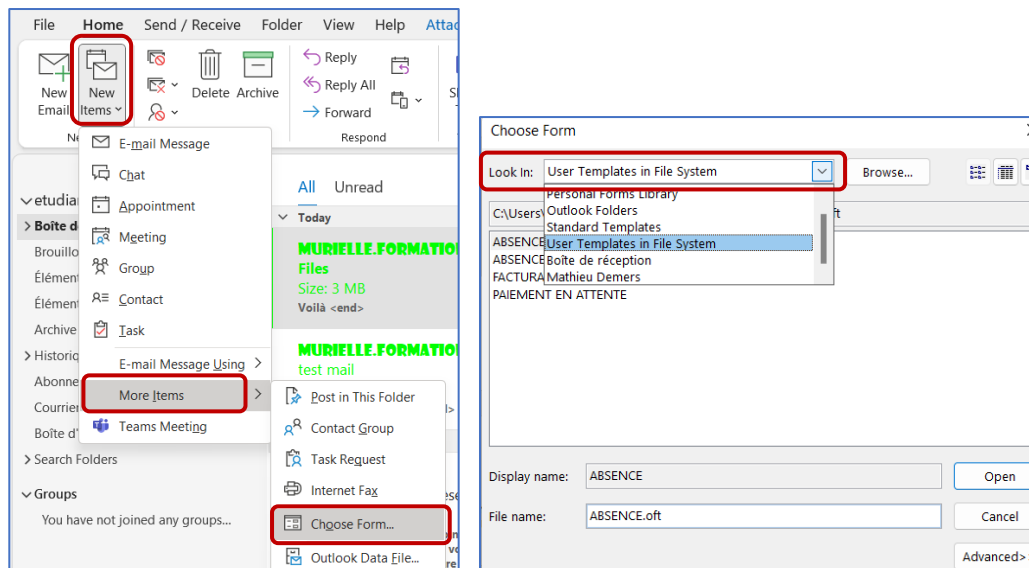
Create your own message templates like in Word if you often send similar emails. Instead of creating multiple signatures, this action might be more effective.

- 1 From a message, type the subject of the message.
- 2 Type your text in the body of the message.
- 3 From the **File** tab, click **Save-As**.
- 4 In **Type**, click **Outlook Template**.
- 5 Click **Save**



CREATE A MESSAGE USING A TEMPLATE.

- 1 Click in **Home**, click **New Items**
- 2 In **More Items**, click **Choose Form**



- 3 In the **Form** window, click **User Templates in File System**
- 4 Click the template you need to use for your message.
- 5 Click **Open**

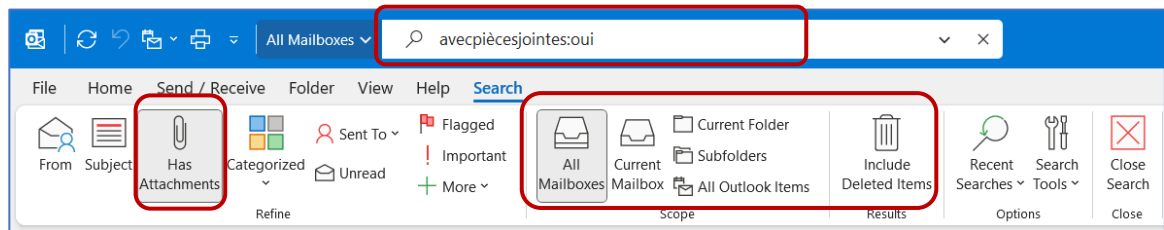
Search tools

Searching for a specific item can seem like a daunting task, especially when you don't really have time to go through all the folders and read every message in it. Fortunately, Outlook allows you to easily filter your data and find what you're looking for at the right time.

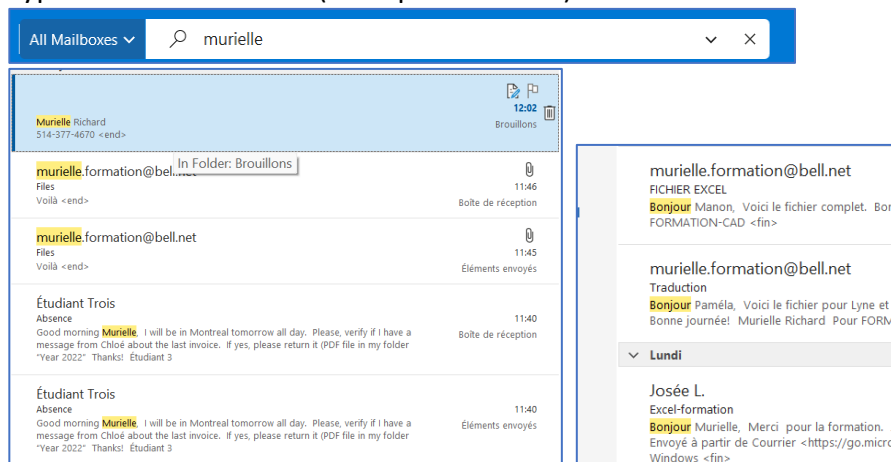
- Restrict your search with a few clicks: add additional criteria to limit your results, and include only items with attachments, over a certain period of time sent or items addressed to yourself or another recipient, etc.
- Quickly refine the scope of your search. Change the scope to expand the search to include subfolders, all email items, or all Outlook items.
- Manage your search options from the results. Change the scope and search options, or quickly go back to a previous search.

FIND AN ITEM

- 1 In the Folder pane, click the folder to search for.
- 2 In the **Instant search** box, type your search text.



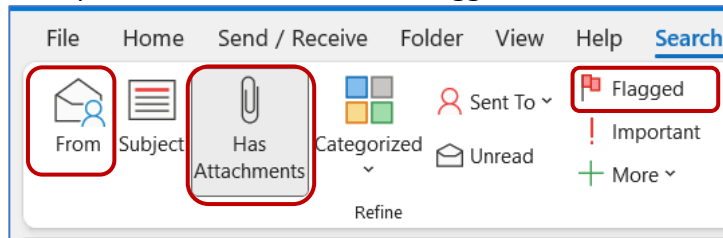
- 3 By default, the search goes to "All mailboxes"
- 4 It's up to you to edit immediately or in the "Scope" group
- 5 Type "Hello" or a name (Example: Murielle) and "Enter" button



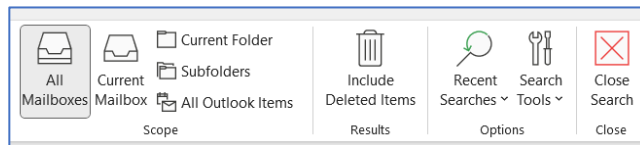
- 6 Items containing the text you typed appear with the text you were looking for highlighted.

- 7 To refine the search, choose more options.

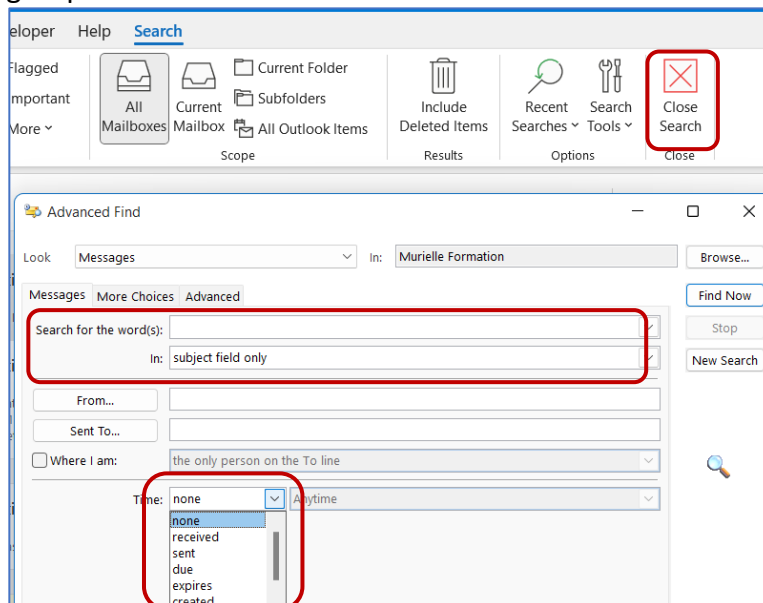
Example: **Has Attachments OR Flagged OR From**



- 8 To expand the search to include all **folders**, click **All Mailboxes** or **All Outlook Items**.



- 9 For more specific searches, use **Search Tools**, located in the **Search** tab, **Options** group



- Search in "Subject field and message body"
- Search in "**Time**"

- 10 Close the search when you have finished.

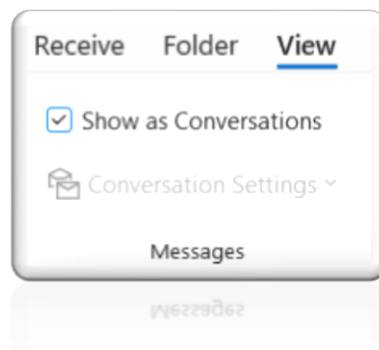
Conversation overview

Presentation of the conversations grouping together the messages received. It could be given the name: **ORGANIZE**

The messages are sorted with the most recent message at the top. You cannot change this sort order.

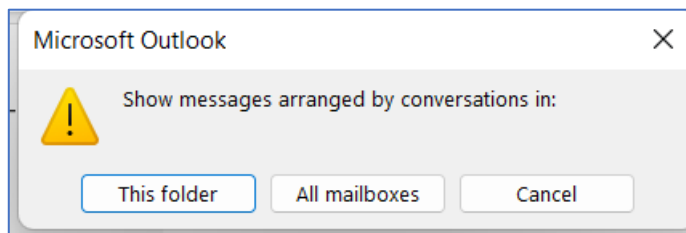
When you receive a new message that is part of a Conversation, the entire Conversation moves to the top of your message list.

Any conversation that has unread messages is indicated by a bold subject and the number of unread messages appears next to the subject. When you click to expand the conversation, all unread messages are marked with their bold title.



From any email folder, such as your inbox, click **View, Show as Conversations** to enable/disable Conversation mode.

- Click all mailboxes or this folder.



Note

CHANGE CONVERSATION OPTIONS

There are several conversation options that you can change.

From any email folder, such as your inbox, click **View, Conversation Settings**

CONVERSATION SETTINGS

Show Messages from Other Folders

Use this option to view messages in the conversation that have been moved to other folders, as well as messages that you have sent that are stored in your Sent Items folder.

Show Senders Above the Subject

This option displays the names of the senders at the top of the conversation rather than the subject of the conversation.

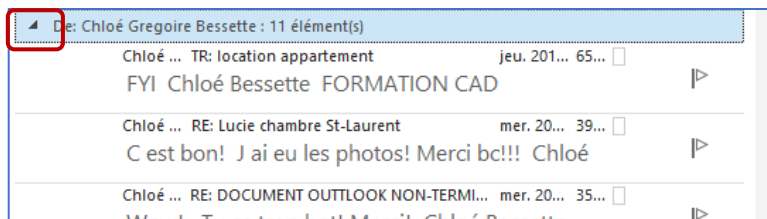
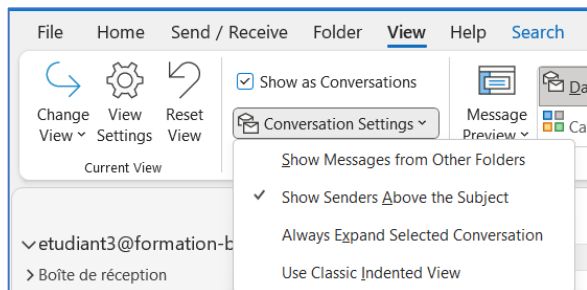
Always Expand Selected Conversations

This option applies only to the selected conversation. The conversation selected when you select this check box will always appear expanded.

Use Classic Indented View

Classic Indented View displays messages in the indented conversation based on their position in the conversation.

By default, messages in your inbox are displayed by **Date**, but you can easily change this option to view your messages by conversation, or "theme." In the **conversations** view, themes are sorted by date, and then messages for each theme are sorted by who replied to whom. You can view message lists in one of your folders, such as sent or draft items, this way.



To Expand or collapse a conversation in the message list

Click **Expand**  or **collapse**  next to the conversation header.

People

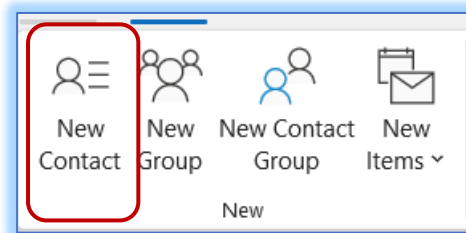
People is the name given to the people, and companies, who make up your professional and personal contacts. The person you add as a contact is entirely discretionary and the only restrictions that may apply to what you can or cannot add are the limits that you or your company impose. Your company, for example, may have rules about matching certain external email addresses.

CREATE A CONTACT

A contact can be a simple name followed by an email address, or you can include detailed information such as a mailing address, phone numbers, a photo, and a birthday. Your contacts appear under the People option in the Quick Access Bar.



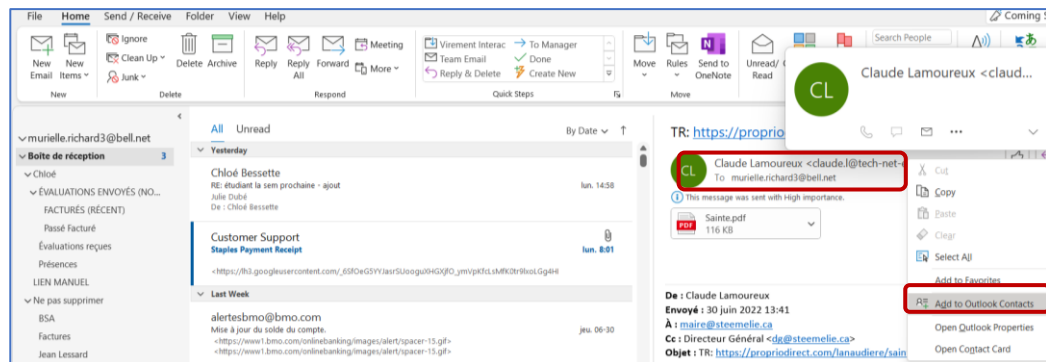
- In People, select **New Contact**.



- Keyboard shortcut: Press **Ctrl + Shift + C**.

OR

- From a received message, click the message
- Click on the email address received
- Right-click Add to Outlook Contacts



- Enter all information, name, email, telephone, etc.

The screenshot shows the Outlook 'Contact' form for Claude Lamoureux. The 'Save & Close' button is highlighted with a red box. The form contains fields for Full Name, Company, Job title, File as, Internet (Email, Display as, Web page address, IM address), Phone numbers (Business, Home, Business Fax, Mobile), and Addresses (Business). A dropdown menu is open for the 'Business' address field, showing options: Business, Home, and Other. The 'Home' option is selected.

This is a close-up of the 'Business' address dropdown menu. The 'Home' option is selected.

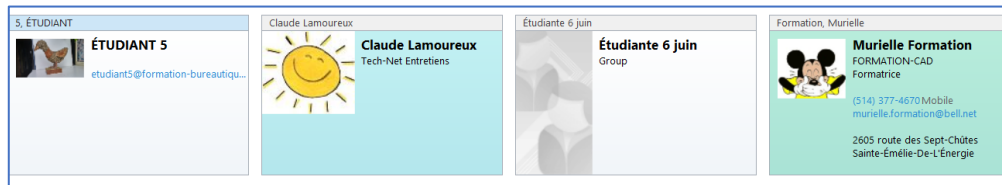
This is a close-up of the 'Addresses' section. The 'Home' address is selected and marked as the mailing address.

The screenshot shows the 'Check Address' dialog box. It contains fields for Address details: Street, City, State/Province, ZIP/Postal code, and Country/Region. The 'Show this again when address is incomplete or unclear' checkbox is checked. The 'OK' button is highlighted.

- Don't forget to Save and close

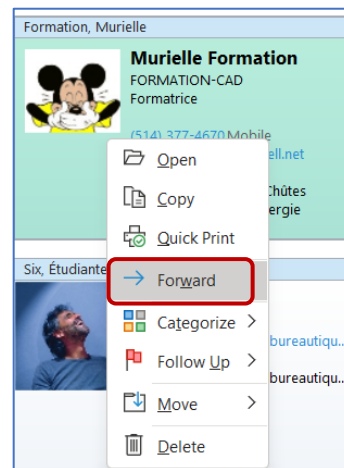
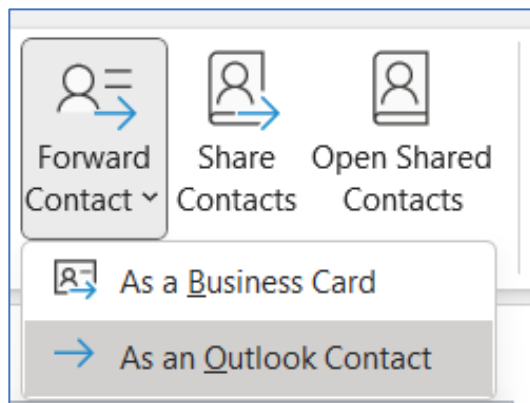
MODIFY A CONTACT

- Open the contact
- Add a photo if necessary
- Double click on the card if you wish to change color or font and style.



FORWARD A CONTACT

- 1 Select one or more contacts to transfer
- 2 From the **People** tab, **share** group



- 3 Click **Forward Contact**
- 4 Type the recipient's address
- 5 Or right-click: Forward contact
The person who receives your message will only have to double-click on the contact
- 6 Apply changes as needed and clickz on **save and close**

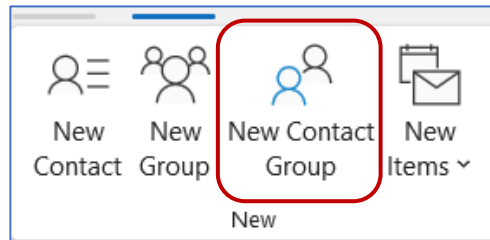


See the different kinds of display in contacts

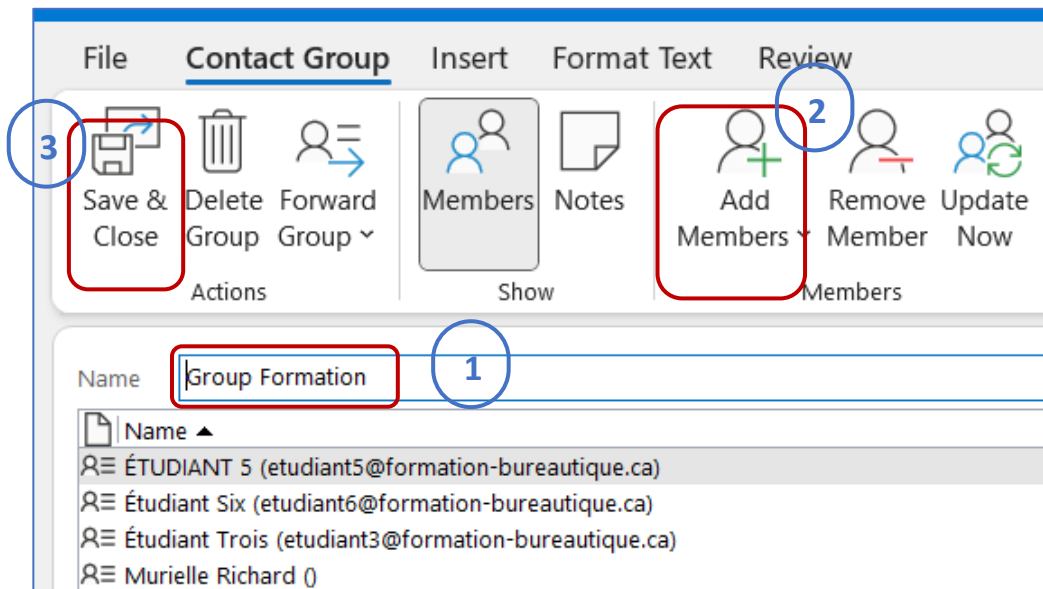
CONTACT GROUP - DISTRIBUTION LIST

A contact **group** also called a "**Distribution List**" to send an email to several people without having to add each name each time you want to send them an email.

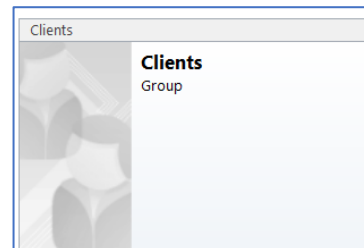
CREATE DISTRIBUTION LISTS (OR CONTACT GROUPS)



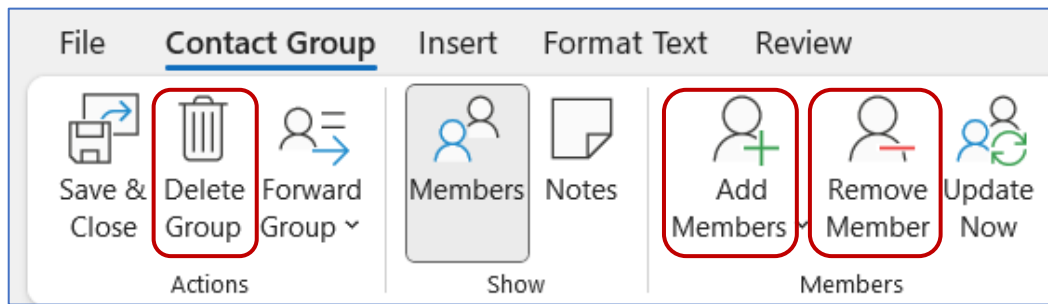
- 1 In the **Name** box, type the name of the new contact group.
- 2 Click the **Add Members** button to add members from any entry in your address book or contact.
- 3 Click **Save and Close** to save the new contact group.



- 4 The name of the distribution list (Contact Group) is displayed in bold relative to the other entries in the Contacts folder. The group ► View is also easier to spot among regular contacts.



ADD - REMOVE MEMBER – DELETE GROUP



- 5 To add a member, or remove a member
- 6 Just open the **contact** group and click **add** or **remove** member
- 7 You can also **Delete the group** from the contacts

 Calendar

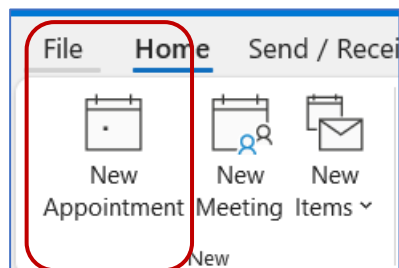
Appointments and meetings are important aspects of your personal and professional life. Your calendar is the ideal tool to manage these two types of items. Outlook also allows you to set reminders and categories for scheduled events.

CREATE A CALENDAR APPOINTMENT



In Outlook, appointments are not to be confused with meetings. Appointments are activities for which you schedule time in your calendar. They do not imply invitations from others, or reservations of resources, such as a conference room or equipment.

- In a **Calendar** folder, select **New Appointment**. You can also right-click a time block in the calendar grid and select **New Appointment**.



- Keyboard shortcut: Press **Ctrl + Shift + A**.

- Tape the "Title"
- Choose the date and time Start – End
- Location if need

- Categorize
- Save & Close
- See how to move - copy an appointment

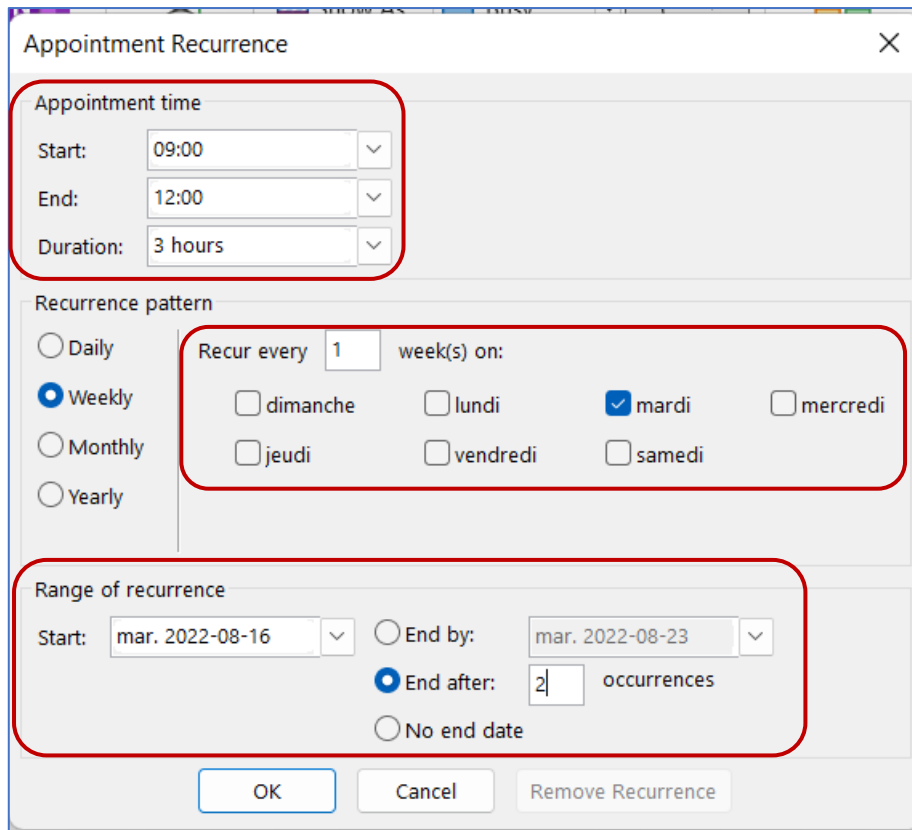
Configure a recurring event

You can configure events. Events can have a specific start and end time or be marked as full-day events.

CREATE AN EVENT

- In your calendar, select the day on which you want your event to occur or select **New Appointment**.
- Enter the name of the event, choose the start time and end time of the event, enter the location, and set a reminder time.
- Categorize it as needed
- Click Make Recurring
- In the **Appointment Recurrence** window, determine whether the occurrence will be **Daily** or **Weekly** or **Monthly** or **Annual**
- Check the day(s) of the week



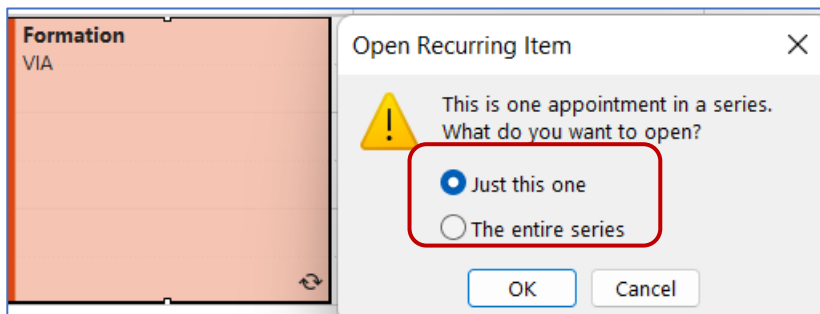


The 'Appointment Recurrence' dialog box is shown with three sections highlighted by red boxes:

- Appointment time:** Start: 09:00, End: 12:00, Duration: 3 hours.
- Recurrence pattern:** Recur every 1 week(s) on:
 - ☐ dimanche
 - ☐ lundi
 - ☒ mardi
 - ☐ mercredi
 - ☐ jeudi
 - ☐ vendredi
 - ☐ samedi
- Range of recurrence:**
 - Start: mar. 2022-08-16
 - ☐ End by: mar. 2022-08-23
 - ☒ End after: 2 occurrences
 - ☐ No end date

Buttons at the bottom: OK, Cancel, Remove Recurrence.

- In Recurrence range, check or type the dates **Start – End** or **End after X occurrences** or **No end date**.



The 'Open Recurring Item' dialog box is shown with a red box highlighting the options:

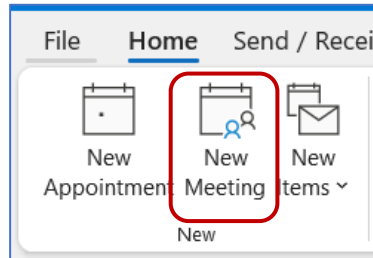
- ☒ Just this one
- ☐ The entire series

Buttons at the bottom: OK, Cancel.

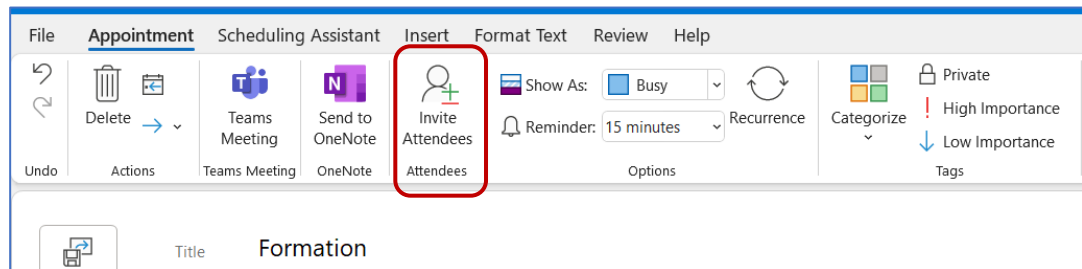
- To modify all occurrences or only one
- Double-click in the instance to open it.
- Check in Just this one or The entire series.

SCHEDULE A MEETING

In Outlook, a meeting includes other people and can include resources, such as conference rooms. You'll have answers to your meeting requests in your inbox.

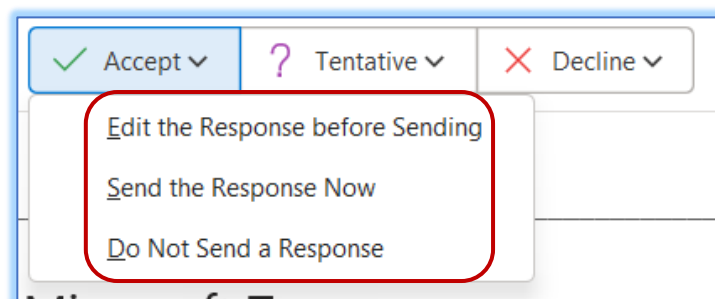


- In a **Calendar** folder, select **New Meeting**.
- Keyboard shortcut: Press **Ctrl + Shift + Q**.
- If you completed the appointment and forgot to click **New Meeting**, you can click **Invite** from the **Participants** group



ACCEPT OR DECLINE AN INVITATION

When you invite participants to a meeting or meeting, the recipient will receive the message with the option: **Accept** or **Decline** or **Propose New Time**.



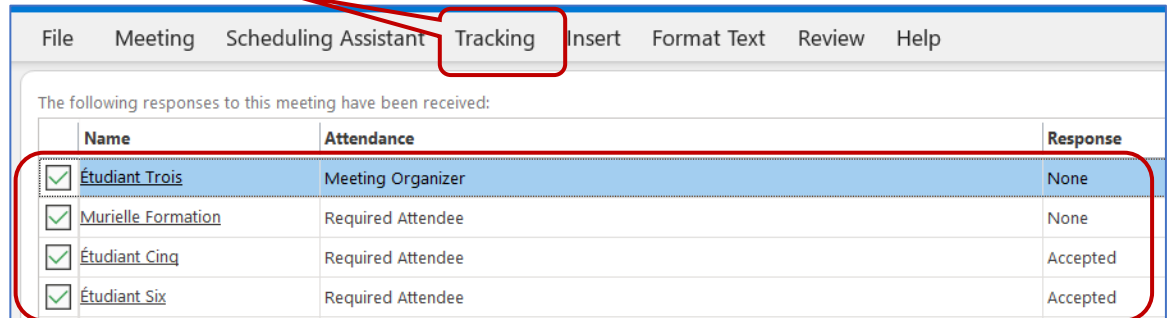
By accepting or refusing, he or she may **Edit the Response before Sending**, **Send the Response Now** or **Do Not Send a Response**.

The advantages of doing so is that the invitation is automatically found in the guest calendar.

FOLLOW-UP OF INVITATIONS

When you invite multiple participants to a meeting, it's important to be able to manage who accepted or declined the invitation.

- From your calendar, **open your invitation**
- Click in the **"Tracking"** tab



The following responses to this meeting have been received:

	Name	Attendance	Response
<input checked="" type="checkbox"/>	Étudiant Trois	Meeting Organizer	None
<input checked="" type="checkbox"/>	Murielle Formation	Required Attendee	None
<input checked="" type="checkbox"/>	Étudiant Cinq	Required Attendee	Accepted
<input checked="" type="checkbox"/>	Étudiant Six	Required Attendee	Accepted

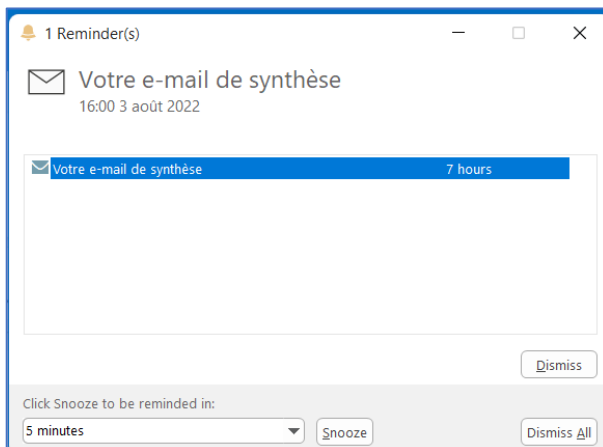
- The follow-up window displays participants' **responses**.

Set a reminder

For a visual reminder and if necessary, audible reminder of the actions to be carried out with a **message**, choose the option of follow ups.

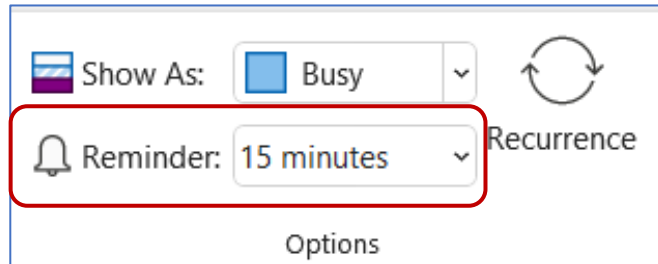


Reminders appear in an alert window to prevent you from missing an important deadline. You can set or delete reminders for virtually any item in Outlook, including **emails, appointments, contacts, and tasks**.



FOR APPOINTMENTS OR MEETINGS

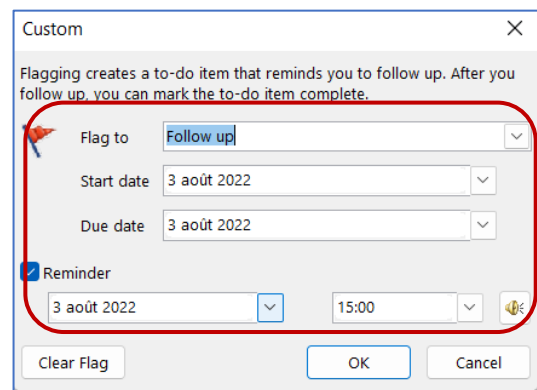
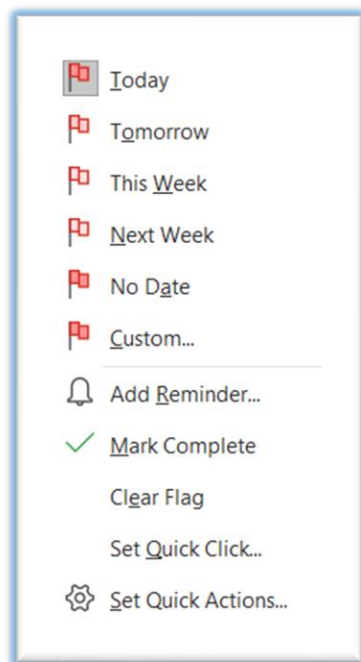
- Open an **appointment** or **meeting**, and then in the Reminder list box, specify how long before the appointment or meeting the reminder should appear.



- To disable a reminder, select: "**None**".

FOR EMAIL, CONTACTS, AND TASKS

You can quickly mark emails as task items by using reminders. Thus, the message appears in the tasks list and in the Tasks folder, but a reminder is not automatically added. Right-click in the message list to add a reminder. Or, if the message is open, select "**Tracking**", "**Add Reminder**".

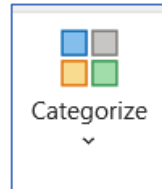


Sort by color categories

As with reminders, categories will be useful for **messages, calendar, contacts, and tasks**.

Use Outlook Color Categories on your items, for grouping, tracking, for a fast visual organization, and therefore more efficient, of your projects.

Be careful, however, to think carefully about your different categories, because all your Outlook items use the same color categories. They must therefore correspond as much to an email, a meeting, a contact, a note, or a task.



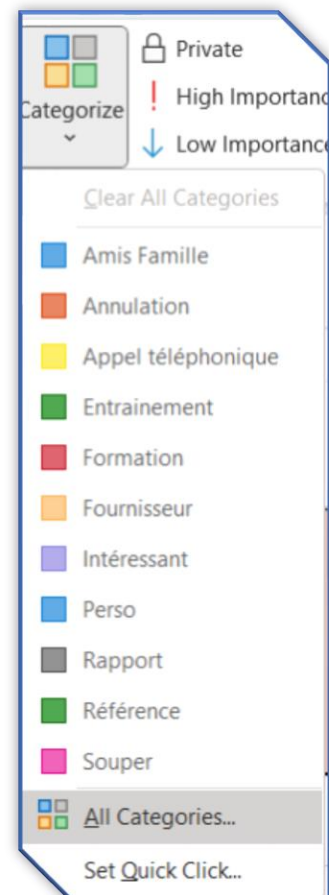
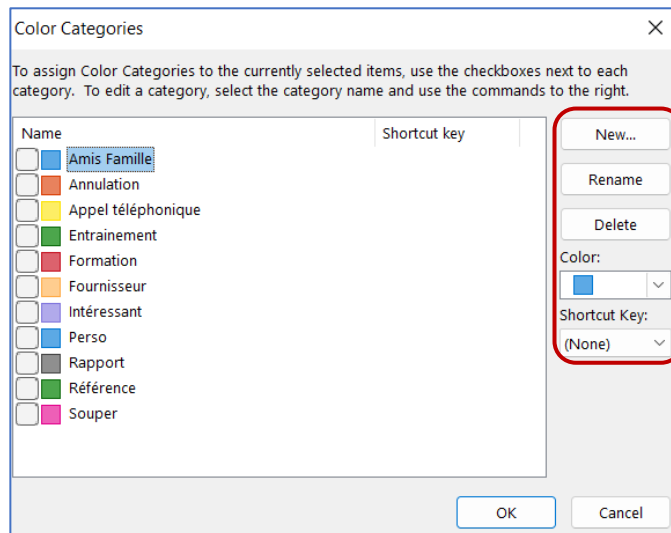
Outlook also allows you to set a Quick Click category by default to assign a message (or other item with a List view) your main category in the blink of an eye.

Here's an example:

- In the calendar, open an **appointment**, Click in the Appointment tab, in the **Tags** group.
- Click in **Categorize** and click in one of the categories

ADD, RENAME, OR DELETE A CATEGORY

- Click All **Categories**.
- You can create up to 25 categories using different colors.
- You can delete them, rename them, and change the colors.



Export contact list

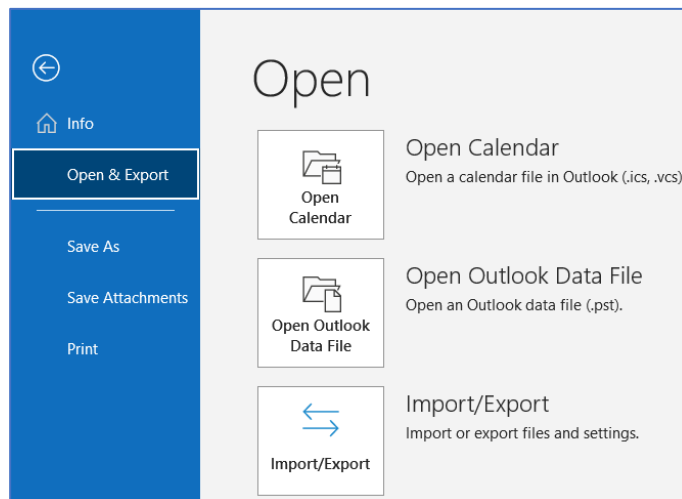
It is recommended to save a copy of the contacts. You can save to a ".pst" file of your contacts to possibly drop them into a new computer. You can export using the option: **Comma-separated values**. This option would allow you to export to EXCEL

We will perform the export by a file (.pst)

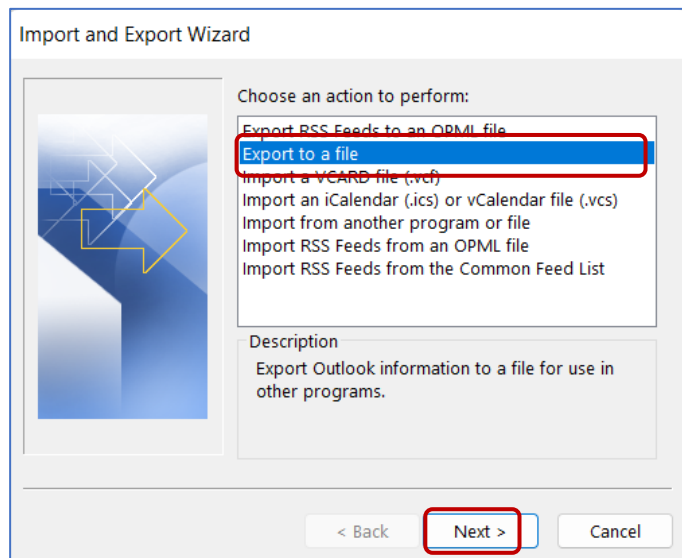
EXPORT CONTACTS, MESSAGES, CALENDAR, NOTES

You can export your contacts or incoming and outgoing messages, calendar, and notes. The procedure to follow is the same method for all. We will demonstrate with the contacts.

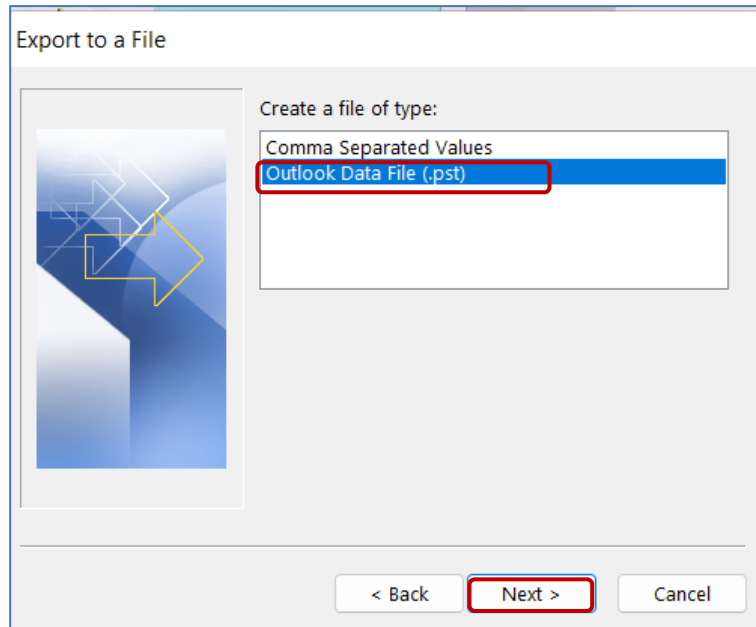
- Click "Import/Export".



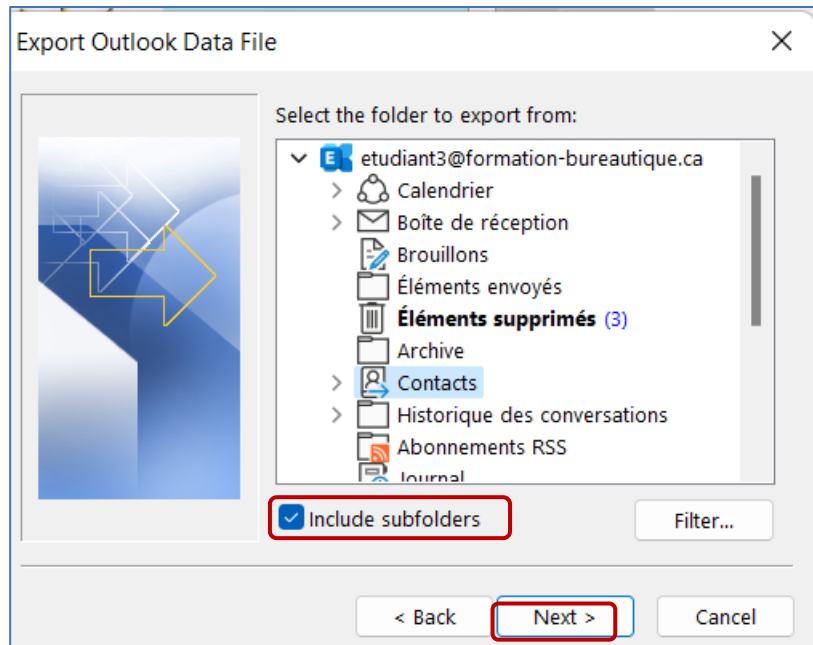
- In the Import and Export Wizard, select Export to a File
- Choose **Export to a file** and then click **Next**



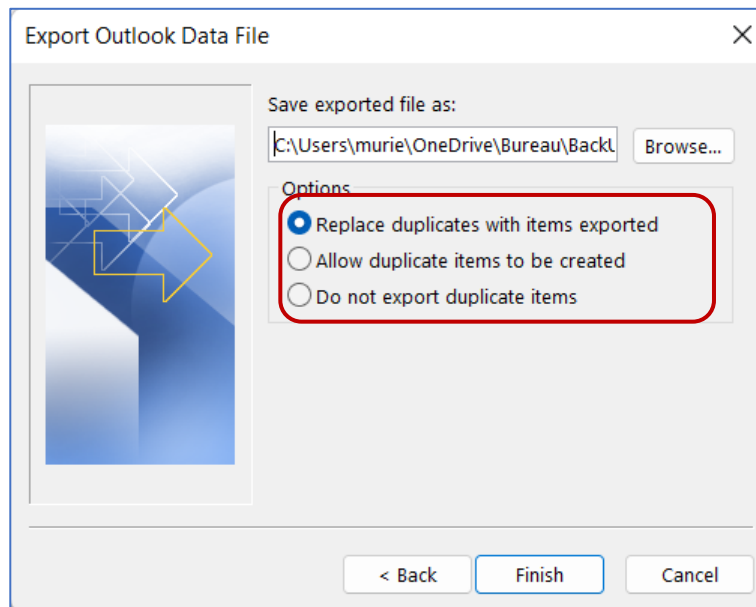
- Click Outlook Data File (.pst)



- Make sure you're in Contacts
- Don't forget to checkmark in **Include subfolders** as needed
- In **Export the contents of the selected folder**, choose the location and name of the file to be backed up.



- Check as needed in **Options** regarding **Duplicates**



- Select **Finish** to start the export process.
- You can add a password, which is optional.



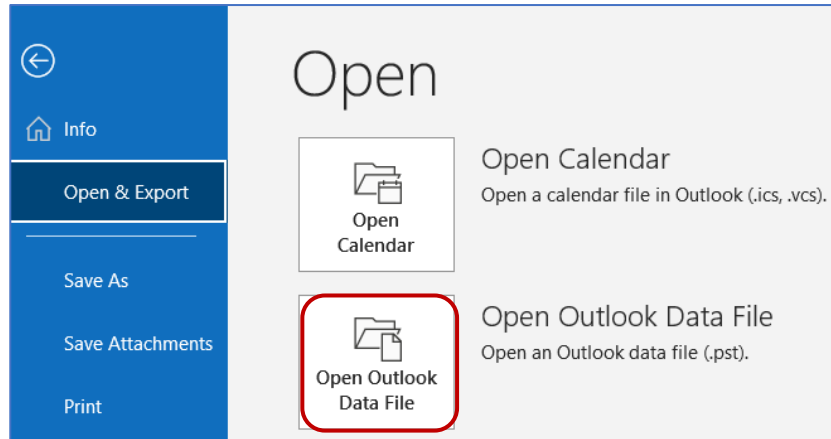
You can export your incoming and outgoing messages, calendar, and notes using the same method

Import your contacts

OPEN THE FILE (. PST) GROUPING YOUR CONTACTS



- Open Outlook, click File, "**Open and Export**",
- Click "Import/Export".
- In the Import and Export Wizard, select **Open Outlook Data File**



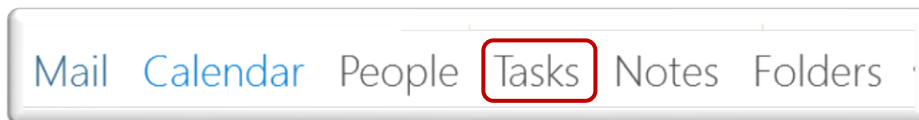
- Navigate to the location where you saved the **.pst** and open it.
- Make sure your contacts appear in Outlook



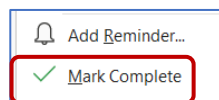
Tasks

CREATE A TASK

Many users keep to-do lists, either on paper, in a spreadsheet, or on both paper and electronic media. In Outlook, you can merge multiple lists into one, receive reminders, and track tasks.





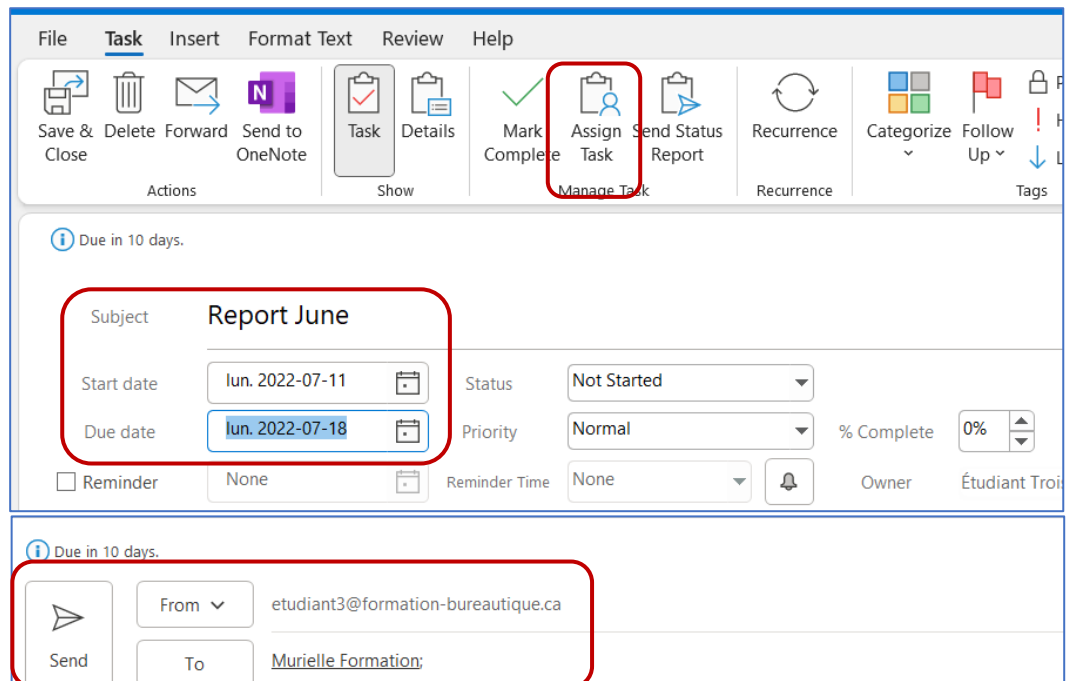
1. Open Outlook. On the **Home** tab, select group **New**, and then select **New Items**. Or **New Task** from **Task** in **Navigation**.
2. Select **Task**, fill out the task form, and then select **Save and Close**.
 - Keyboard shortcut: Press **Ctrl + Shift + K**.
 - When the task is **complete**, right click, **Mark Complete**.



ASSIGN A TASK

You are too overwhelmed or have other obligations, delegate some of your tasks by assigning them to your colleagues or employees.

1. Select  in the quick access bar or **Tasks** on the navigation bar.
2. Do one of the following:
 - Select  on the ribbon or press **Ctrl + Shift + K** to create a task.
- OR**
- **Open** an existing task.
3. Select **Assign Task**.
4. In the Task form, do the following:
 - In the **To** box, enter a name or email address.
 - Add an **Object**, select a **Start Date** and **Due Date**, and set the **Status** and **Priority** as needed.
 - Select or clear the default selection of check boxes Keep an updated copy of the task in my task list and send me a status report when the task is complete.
 - If necessary, type a message in the content block under the check boxes.



The screenshot shows the Microsoft Task form interface. The ribbon at the top includes tabs for File, Task, Insert, Format Text, Review, and Help. The 'Task' tab is active, showing various task-related icons. The 'Assign Task' icon is highlighted with a red box. Below the ribbon, the task form is displayed. The 'Subject' field contains 'Report June'. The 'Start date' is 'Jun. 2022-07-11' and the 'Due date' is 'Jun. 2022-07-18'. The 'Status' is 'Not Started' and the 'Priority' is 'Normal'. The '% Complete' is 0%. The 'To' field contains 'etudiant3@formation-bureautique.ca' and 'Murielle Formation'. The 'Send' button is highlighted with a red box.

- If you want the task to repeat, select **Recurrence** on the ribbon, select the options that you want in the Task Recurrence dialog box, and then click **OK**.
- Select **Send**.

ACCEPT OR DECLINE AN ASSIGNED TASK

When a task is created and assigned to you, it appears in your Inbox.

✓ Accept ✗ Decline

- In the reading pane, select **Accept** or **Decline**.
- OR
- Open the task, select **Accept** or **Decline** from the ribbon, and whichever option you choose, select **Edit Reply Before Sending** or **Send Reply Now**, and then click **OK**.
- Notice that accepted tasks appear in your Outlook task list.

If you open a task, you can **reply**, **reply to all**, or **forward** to the person who assigned the task to you, as appropriate. You can also include a comment in the message block.


If you are starting the task and wish to notify your manager that it is in progress but not completed:

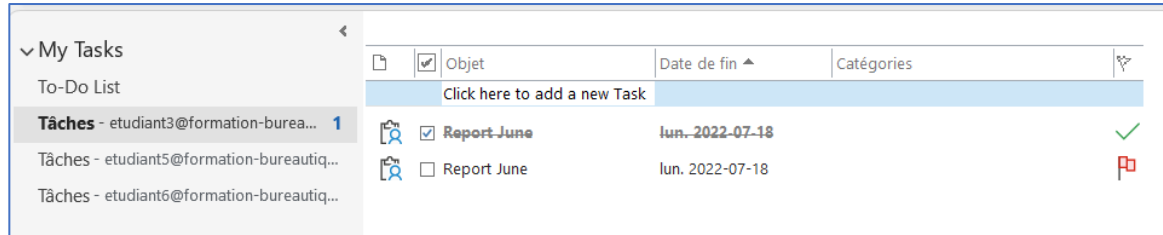
- Open the task, check the percentage already done and **Send report**

The screenshot shows the Outlook interface for managing a task. The ribbon at the top includes 'File', 'Task', 'Insert', 'Format Text', 'Review', and 'Help'. The 'Task' ribbon has several groups: 'Actions' (Save & Close, Delete, Send to OneNote), 'Show' (Task, Details), 'Respond' (Decline, Reply, Reply All, Forward), 'Manage Task' (Mark Complete, Assign Task, Send Status Report), 'Categorize', and 'Follow Up'. The 'Send Status Report' button is highlighted with a red box. Below the ribbon, the task details pane shows 'Due in 10 days. Last update sent on 2022-07-08 15:05.' The subject is 'Report June'. The start date is 'Sun. 2022-07-11' and the due date is 'Sun. 2022-07-18'. The status is 'In Progress', priority is 'Normal', and the '% Complete' field is set to 50%. The '% Complete' field is also highlighted with a red box. The reminder is set to 'None' and the owner is 'Étudiant Cinq'.

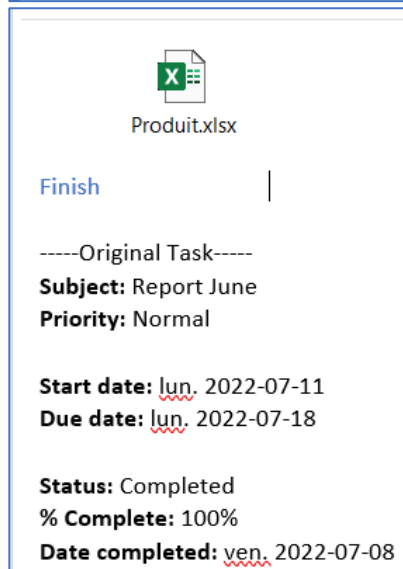
- When you're done, put **100%** in **% Completed**
- You can even insert a file into the message to be sent
- This will appear as **Completed** to the person who assigned you this task.

VIEW A TASK

1. Open Outlook, and then on the Quick Access Toolbar, select .
2. In your **Task List** or **My Tasks**, double-click an item to display the full form.

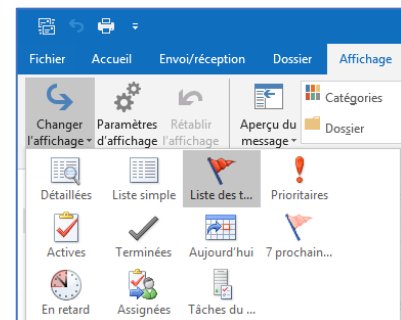


3. Email will be received also with confirmation "Task Completed"



CHANGE THE TASK VIEW

- On the **View** tab, in the **Current View** group, select a different view in **Change View**.



A LITTLE ADVICE

If you assign a recurring task, a copy of that task remains in your task list but is never updated. If you select the **Send me a status report when this task is complete** check box, you receive a status report for each completed occurrence of the task.



Outlook allows you to track the progress of a task assigned to a single person. If you want multiple people to work on a task, divide the task into subtasks or assign the task individually. For example, to track a report to be written by three authors, create three separate tasks, and then assign each individual task to the appropriate author.

PRINT A TASK

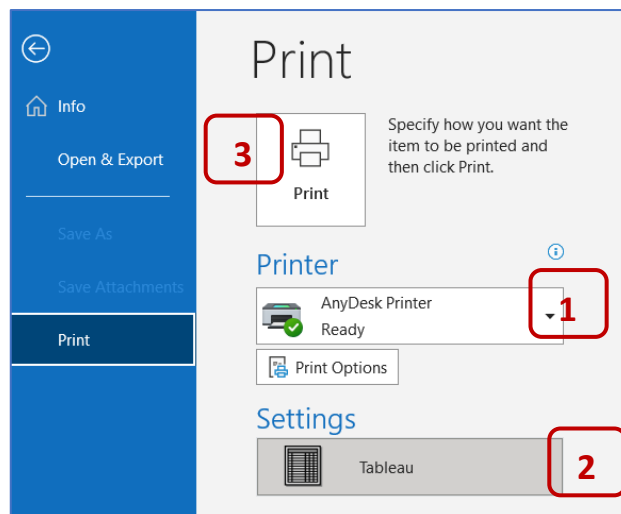
You can choose how your tasks are displayed, and then, depending on what you choose to print, in what format (table style or memo style) the task is printed. If you select only one job to print, for example, the only print setting available is memo style. However, if you choose a list such as the task list, a table style print format is also offered.

1. Choose a single task from one of your **task list** folders or select a folder.
2. Select **File, Print**, and then select the format (if any) under Settings.

Print an email, contact, or calendar item

In Outlook, you can print individual items (such as email, contacts, or calendar items) or larger views (such as calendars, address books, or email folder content lists).

1. Select an Outlook item or folder that you want to print.
2. Select **File, Print**.



1. Choose printer
2. Change printing options as needed
3. Send to print

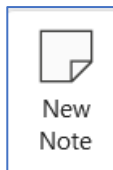
Notes

Notes are the electronic equivalent of adhesive papers that you stick all over your screen or desk. Use the notes to write down your questions, ideas, reminders, and anything else you could write down on paper. You can leave the notes open on the screen while you work. This is handy when you use notes to save information that you would need later, such as instructions or text that you would like to reuse in other items or documents.

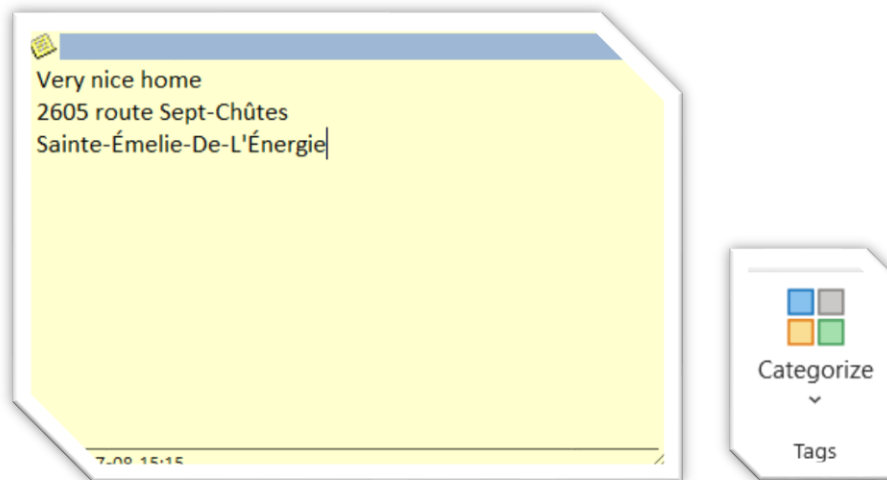
Mail Calendar People Tasks **Notes** Folders

CREATE A NOTE

- In Notes, on the **Home** tab of the group **New**, click **New Note**.



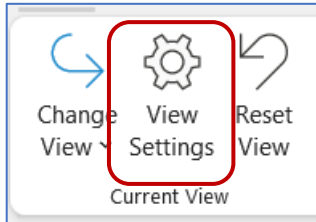
- Type the text of the note. The note is saved automatically.
- To close, click the icon in the upper-left corner of the window or the **X** on the right



- Keyboard shortcut: Press Ctrl + Shift + N.
- Resize as needed (Lower right corner)
- Categorize it as needed

Conditional formatting

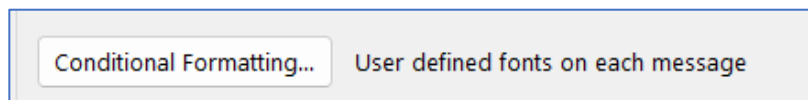
You also have the option to **automate the formatting** of new emails from some of your most important contacts to avoid missing out on their messages.



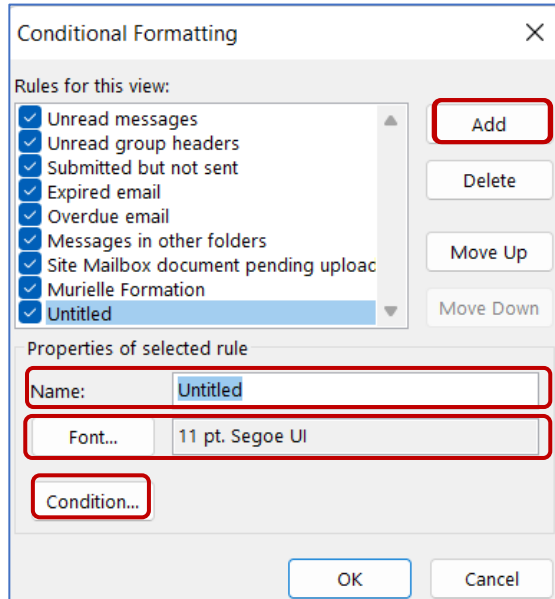
CREATE CONDITIONAL FORMATTING

Example: Show all messages from a particular person in red

1. Click **View Settings**, located on the **View** tab
2. Click **Conditional Formatting**

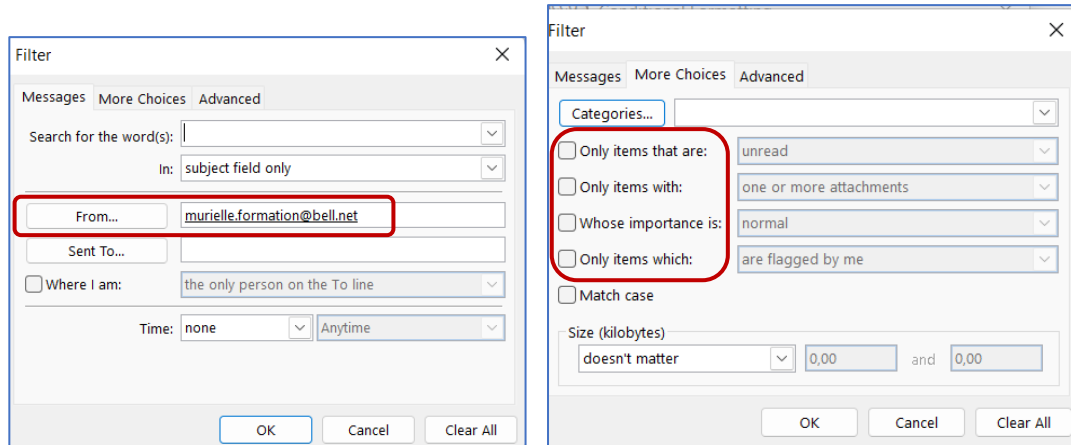


3. Click **Add**
4. Type a name for the rule.



5. Click **Font**.
6. Change the **color**, **size**, and **font** of your choice.
7. Click **OK**.
8. Click **Condition**.

9. In Condition, enter the name of the contact **"From..."** »



10. Click **OK**

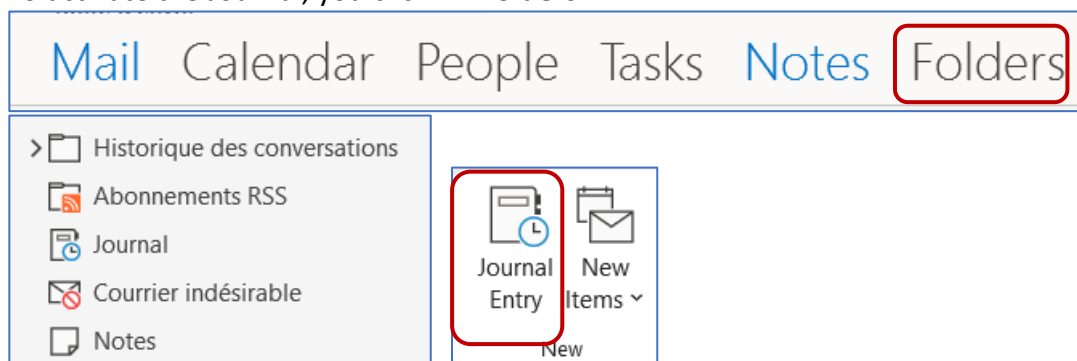


Journal Entry

The **Journal** is used to remember either a conversation, a phone call, it can also be a letter received or sent, well, it is something you want to remember.

CREATE AN ENTRY IN THE "JOURNAL"

1. To activate the Journal, you click in **"Folders"**



2. The "Journal" will be displayed in "Folder Pane"
3. Click in **"Journal Entry"** located in Home OR **CTRL + N**

4. Type the subject, Entry type, date, time, etc.

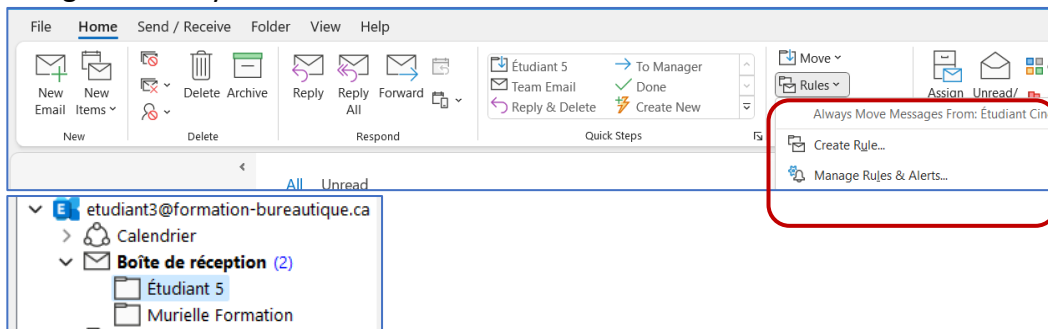
5. Save and close

Create a rule


You create a rule to move messages to a folder, but also to **delete certain unwanted messages**, to block messages with specific words to permanently delete them.

OUTLOOK GIVES YOU 3 OPTIONS TO CREATE A RULE:

1. This first solution is fast, just click on one of the contact's messages, then on **Rules** in the **Move** group of the **Home** tab and choose the **Always move messages from...**, and then choose the destination **folder**. Here you cannot include specifications.
Or right click of your mouse on an email



2. The second solution offers you some additional options. Similarly, click one of the contact's messages, click **Rules** in the **Move** group on the **Home** tab, and choose the **Create Rule...**, then complete the form that appears as needed. In this dialog box, the **Advanced Options** leads you to the third solution.
3. The third solution offers you a step-by-step customization of your rule. It's longer, but above all, more precise. Click **Rules** in the **Move** group on the **Home** tab, choose the **Manage Rules and Alerts...**

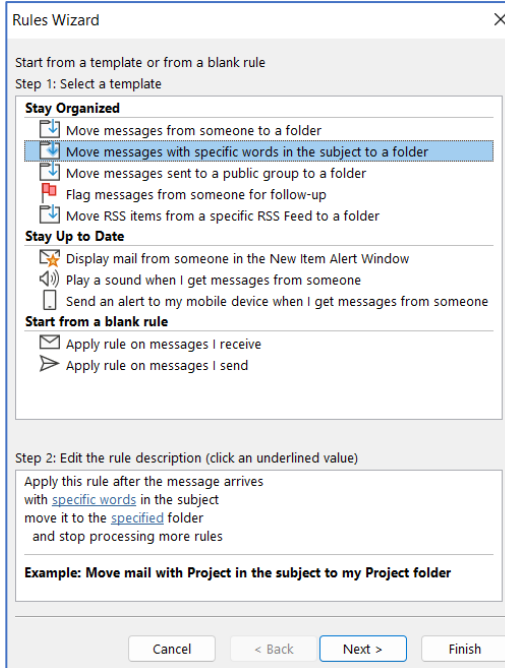


**Manage Rules
& Alerts**

Rules and Alerts

Use Rules and Alerts to help organize your incoming email messages, and receive updates when items are added, changed, or removed.

4. Complete the 5 dialog boxes that appear over the validations (next button). Of course, you don't have to complete everything if it doesn't meet your expectations. You can skip a step with the **NEXT** button. In your last step after naming your rule, you can enable it on messages that have already been received or not.



Rules Wizard

Start from a template or from a blank rule
Step 1: Select a template

Stay Organized

- ☐ Move messages from someone to a folder
- ☒ Move messages with specific words in the subject to a folder
- ☐ Move messages sent to a public group to a folder
- ☐ Flag messages from someone for follow-up
- ☐ Move RSS items from a specific RSS Feed to a folder

Stay Up to Date

- ☐ Display mail from someone in the New Item Alert Window
- ☐ Play a sound when I get messages from someone
- ☐ Send an alert to my mobile device when I get messages from someone

Start from a blank rule

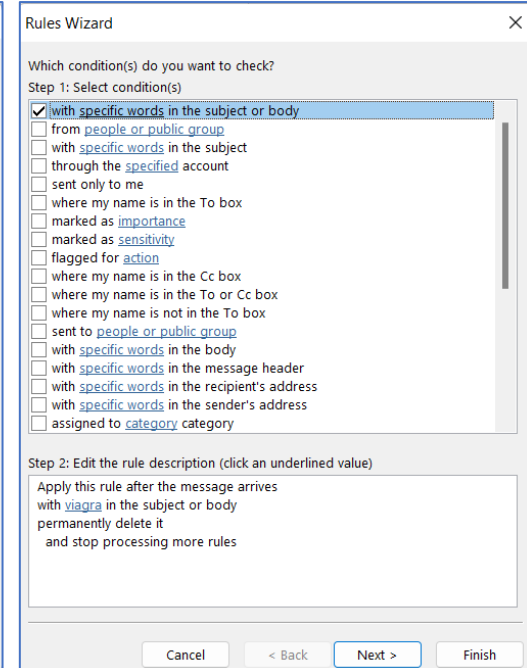
- ☒ Apply rule on messages I receive
- ☐ Apply rule on messages I send

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with specific words in the subject
move it to the specified folder
and stop processing more rules

Example: Move mail with Project in the subject to my Project folder

Cancel < Back Next > Finish



Rules Wizard

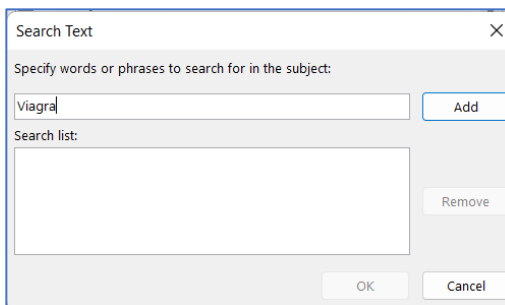
Which condition(s) do you want to check?
Step 1: Select condition(s)

- ☒ with specific words in the subject or body
- ☐ from people or public group
- ☐ with specific words in the subject
- ☐ through the specified account
- ☐ sent only to me
- ☐ where my name is in the To box
- ☐ marked as importance
- ☐ marked as sensitivity
- ☐ flagged for action
- ☐ where my name is in the Cc box
- ☐ where my name is in the To or Cc box
- ☐ where my name is not in the To box
- ☐ sent to people or public group
- ☐ with specific words in the body
- ☐ with specific words in the message header
- ☐ with specific words in the recipient's address
- ☐ with specific words in the sender's address
- ☐ assigned to category category

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with viagra in the subject or body
permanently delete it
and stop processing more rules

Cancel < Back Next > Finish



Search Text

Specify words or phrases to search for in the subject:

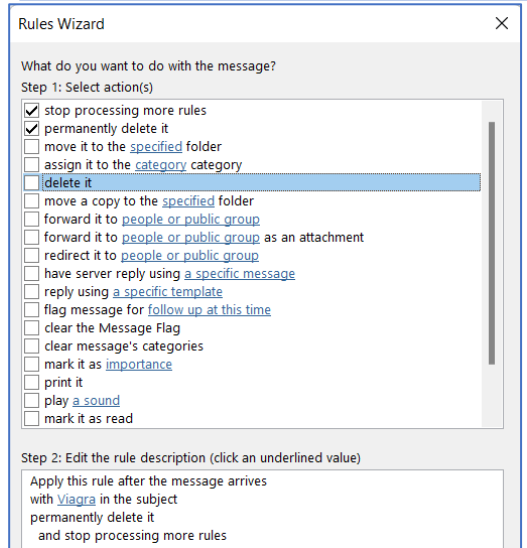
Viagra

Add

Search list:

Remove

OK Cancel



Rules Wizard

What do you want to do with the message?
Step 1: Select action(s)

- ☒ stop processing more rules
- ☒ permanently delete it
- ☐ move it to the specified folder
- ☐ assign it to the category category
- ☒ delete it
- ☐ move a copy to the specified folder
- ☐ forward it to people or public group
- ☐ forward it to people or public group as an attachment
- ☐ redirect it to people or public group
- ☐ have server reply using a specific message
- ☐ reply using a specific template
- ☐ flag message for follow up at this time
- ☐ clear the Message Flag
- ☐ clear message's categories
- ☐ mark it as importance
- ☐ print it
- ☐ play a sound
- ☐ mark it as read

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with Viagra in the subject
permanently delete it
and stop processing more rules

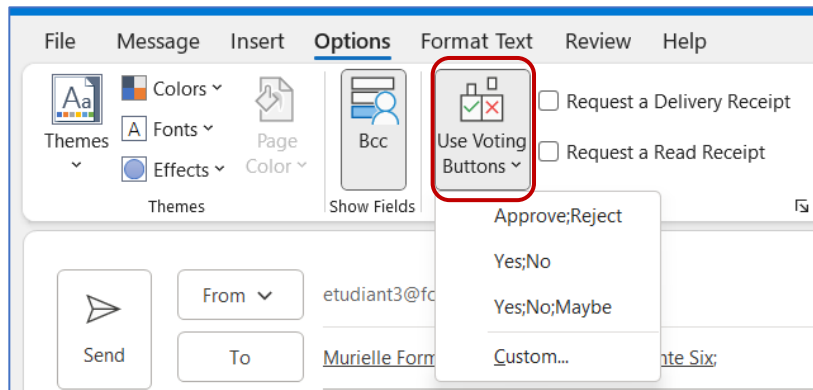
Voting buttons

USE VOTING BUTTONS TO CREATE OR RESPOND TO POLLS

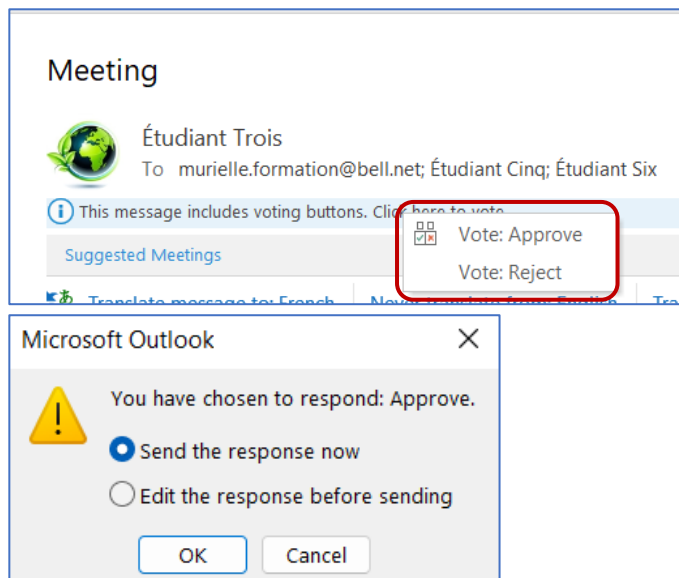
Your buttons are a great way to survey people, especially large groups of people. A Microsoft Exchange Server account is required to send and respond to voting buttons.

In some of your emails for quick and professional surveys.

1. Create a **new message**
2. Tap "**Options**" Group ► "**Tracking**" "**Use voting buttons**"



3. People will receive you email and will "Approve" or "Reject"

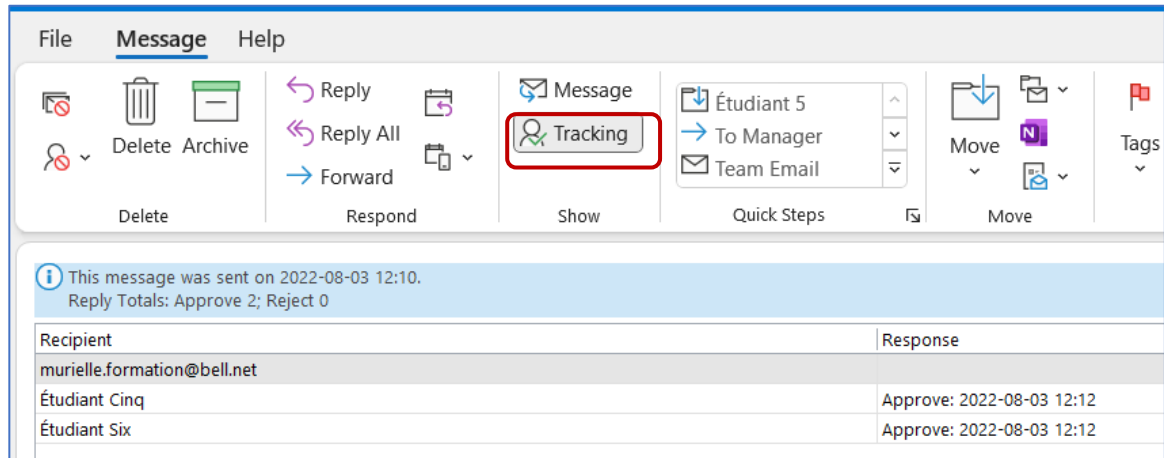


4. You will receive confirmation of "**Approve**" or "**Reject**" from them

TRACK AND PRINT SURVEY RESULTS

When you create and send a survey to others, it can be helpful to track and print the results. You can either quickly copy the voting results to a blank Word document or copy them to Excel to compile the data

1. In the Sent Items folder, open the email message that you sent that contains the survey.



2. Click **Tracking** of the **Message** Tab Group ► "Show"
3. Select your answers and **copy** or **CTRL + C**
4. Open **EXCEL** or **WORD** and **paste** or **CTRL + V**

	A	B
1	Étudiant Cinq	Approve: 2022-08-03 12:12
2	Étudiant Six	Approve: 2022-08-03 12:12



The Track button does not appear until a vote has been returned.

5. You can now analyze your data

Time-saving practices on Outlook:

For a more efficient organization on Outlook, here are the best practices to adopt:

1. Use the "**Drag and drop**" to turn any Outlook item into another (an email into an appointment, a task or a contact, an appointment into a task...)
 - You should drag one item (e.g. a task) to another (e.g. Calendar) in your navigation pane on the left side of your screen.
 - However, dragging and dropping with the left side of the mouse has some disadvantages to consider:
 - ✓ Duplication of the item
 - ✓ Attachments disappear...
 - To overcome these disorders, prefer the "**Drag and drop**" with the right side of the mouse. In this case, you get a choice of options that will allow you to determine exactly which option interests you.

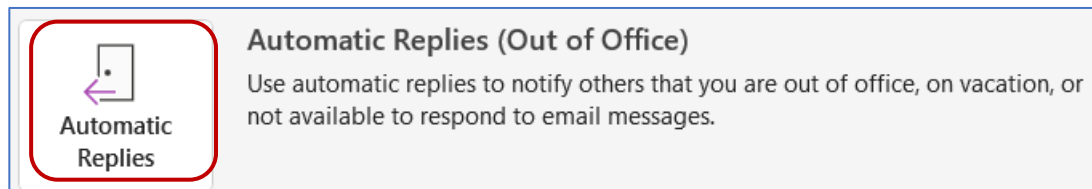
Absence Manager

There are two methods available to send automatic out-of-office replies. The method to use depends on the type of email account you have.

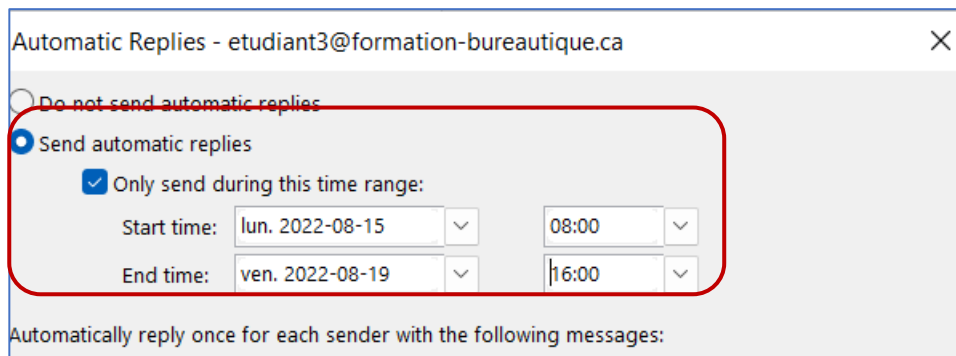
Click **File**, and then select the image for your version of Outlook.

SET UP AN AUTOMATIC REPLY

1. Select File, **Automatic Replies**.



2. In the **Automatic Replies** dialog box, select **Send Automatic Replies**.
3. Set a date range for your automatic replies.



4. In the **Inside My Organization** tab
 - Type the answer you want to send to your colleagues when you are away from the office.
5. On the **Outside My Organization** tab (**Enabled**)
 - Click the Outside My Organization tab (Enabled)
 - **Type a different message** than the one located in Inside my organization

6. Click **OK**



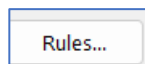
Often the message of absence is different from the one addressed to the people who work within your organization than the one who work outside your organization.

CREATE A RULE (OUT OF OFFICE)

You can create one or more rules. Example:

Your messages come from a particular person; the message must be sent to another person.

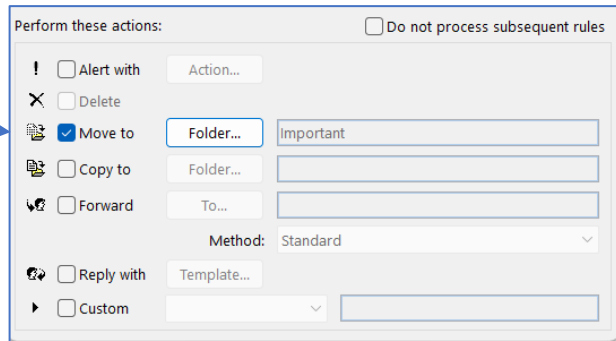
1. In the Automatic Replies window, click Rules, located in the left corner at the bottom of the window



2. **"From..."** » Type the name of the person from whom the message comes
3. **"Sent to..."** . Type the name of the person you want to send the message to.

4. You can create other rules, example:

- Alert with
- Delete
- Move to - "Folder "
- Copy to
- Forward



TURN OFF AUTOMATIC OUT-OF-OFFICE RESPONSES

When Outlook is configured to send automatic replies, a message appears under the ribbon with this information. Check **Do not send automatic reply** to turn off automatic out-of-office responses.

